

Alice M. Cathcart

alicecathcart@gmail.com

EXPERIENCE

- 2007-Present **Vice President**, Philadelphia Industrial Development Corporation Philadelphia, PA
Lead PIDC (City of Philadelphia's economic development implementation agency) market development and outreach strategy for early-stage technology companies, including those in the life science, software, and alternative energy industries. Coordinate regional Keystone Innovation Zone state economic development program for The Navy Yard, Philadelphia.
- Define investment strategy, criteria for emerging technology companies
 - Coordinate with other local agencies to recruit Fortune 500 companies to Philadelphia
 - Defined, secured resources, and supervised multi-agency GIS project to expose 10 economic development zones to the public for the first time in 50-year agency history
 - Led effort with finance team to create underwriting procedures for new firms
- 2005-2007 **Marketing Director**, Halloo Communications, Inc. South San Francisco, CA
Developed and executed marketing and product strategy for telecommunications start-up delivering business-critical level voice over IP (VoIP) telephone services to small and medium sized companies.
- Defined target market for product and help develop channel sales strategy.
 - Developed collateral strategy and copy for print, web, and targeted email programs.
 - Defined requirements and supervised development of public website, channel sales portal.
 - Improved organizational capacity by leading process definition and documentation for product development, customer service, and sales support.
 - Led successful participation in major industry tradeshow in collaboration with sales team, including design supervision and production of marketing collateral and communications (*Awarded Best of Show Runner-Up in two marketing categories out of 150+ exhibitors*).
- 2003-2004 **Product Manager**, QuickBooks Group, Intuit, Inc. Mountain View, CA
Responsible for QuickBooks in-product customer assistance and post-launch quality control.
- Developed multi-year product strategy to improve customer ease of learning.
 - Defined & prioritized online, infrastructure, and in-product initiatives to improve customer self-service experience and drive cost savings over proposed off-the-shelf technology.
 - Led definition of product initiative and reporting requirements (including relational database schema design), that resulted in 60% decrease in QuickBooks product crashes.
- 2001-2003 **Program Manager**, QuickBooks Group, Intuit, Inc. Mountain View, CA
Led cross-functional teams to execute complex software development projects. CMM Level II.
- Designed, built, tested, and deployed internal web-based database for QuickBooks release project management – enabled division to avoid outsourcing cost of \$250K/yr.
 - Planned & rolled-out training to 100+ mid-level and senior managers
 - *Awarded QuickBooks Group Innovation Award* (<10 annual awards across division for outstanding business contributions)
 - Managed QuickBooks Enterprise v.1.0 release – Led cross-functional team (engineering, product management, marketing, sales, support, operations) to deliver division's first new major product offering:
 - Initiated formal checkpoints, defined release process quality criteria
 - Increased team accountability and communications through innovations subsequently implemented throughout division to every QuickBooks release.
 - Released product on time with three geographically dispersed teams, late-cycle scope changes, and an original schedule 30% shorter than any prior QuickBooks release.

- Project-managed initial launch of QB Credit Check Service – Led 3rd party remote cross-functional team to define and develop initial offering of client-server integrated service.

2000-2001

Geographic Scientist, U.S. Geological Survey.

Menlo Park, CA

Defined new ways to combine natural & social science data on natural disasters to inform public policy and mitigate future damage and loss. Projects investigated the value of GIS data in communicating risk to residents, business owners, and policy makers.

- San Francisquito Creek Community Resource Management Process, Palo Alto, C
Developed spatial maps of flood zones and potential mitigation plans, visual representation of cost-benefit analyses in GIS to inform policy decisions regarding several proposed flood mitigation measures.
- Cost-Benefit Analysis (CBA) of proposed GIS national data portal to aggregate and present natural and social science data produced by federal agencies - Designed framework & executed analysis of \$12M federal budget line-item initiative to meet congressional mandate.

EDUCATION

1997-2000

Stanford University, Stanford, CA

M.S., Earth Systems, School of Earth Sciences. Interdisciplinary environmental science and policy. Coursework included Biological, Geological, Physical Sciences, Economics, and Public Policy.

- Program Teaching Assistant, Stanford. Competitively selected to coordinate introductory lecture course with 100 students and small senior-level seminar. Hired & led 6-member teaching staff, tutored advanced writing seminar.
- Environmental Policy Intern, White House Office of Science and Technology Policy, Washington, D.C. Wrote science and policy briefings on climate change and environmental policy for the Science Advisor to the President.
- Ecology Research Assistant on natural recolonization of abandoned pastures, Costa Rica.

1993-1997

Stanford University, Stanford, CA

B.S., Biological Sciences, School of Humanities and Science. Dual honors theses: Biological Sciences (*The influence of invasive species on the reproductive cycle of P. napi*) and International Environmental Science and Policy (*Burden Sharing under the Kyoto Protocol: the Implications of Climate Model Selection*)

- Secured grant funding, planned, and executed independent research butterfly ecology project at Rocky Mountain Biological Lab in Gothic, CO for departmental honors thesis.
- Competitively selected for interdisciplinary international environmental studies honors program.

LEADERSHIP

Board of Directors, Delaware Valley Green Building Council (2009-present)
Chair, Delaware Valley Green Building Council Development Committee (2008-2009)
Board Member, Women's Action to Gain Economic Security, Oakland, CA (2004-2006)
Junior Varsity Girls' Water Polo Coach, Gunn High School, Palo Alto, CA. (2001)
Captain (2 years), Varsity Women's Water Polo, Stanford University (1995-1997)
U.S. Junior National & Senior National "B" Water Polo Teams (1994-1997)

AWARDS

Rotary Foundation International, Cultural Ambassadorial Scholarship, Costa Rica (1997-1998)
Stanford University, Academic All-American all eligible quarters, Stanford in Government Fellowship Recipient (1999), Undergraduate Research Opportunity Grantee (1996), University-wide awards in Freshman year for academic excellence, excellence in non-fiction writing (1994). All-American (1st team) Water Polo (1997).

SKILLS

Fluent in Spanish, French. Some study of Mandarin.
Proficient in MS Office (including Visio). Working knowledge of Adobe design products (Acrobat Pro, Illustrator, InDesign, Dreamweaver), Matlab, HTML, SQL.

MICHAEL S. COOPER

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Philadelphia, PA 19106
(215) 601-3886
msc6581@hotmail.com

OBJECTIVE

To have a challenging and meaningful career in public policy or governmental relations that will provide a continuing environment for learning and growth, while utilizing my experience and strong communication skills.

EDUCATION

Master of Public Administration (MPA), Widener University, Chester, PA, December 2006.

GPA 3.87/4.0 Specialization: Nonprofit Management

Courses included: Budgeting and Finance in Public Administration, Fundraising, Ethics, Personnel Management, Organizational Theory, Quantitative Analysis, and Marketing for Nonprofits

Bachelor of Arts (BA), Political Science, The Pennsylvania State University, University Park, PA, May 2003

GPA 3.04/4.0

EXPERIENCE

Philadelphia Industrial Development Corporation, Philadelphia, PA

Assistant Vice President, Market Development Group, February 2009 - Present

Relationship Manager, Market Development Group, November 2007 - February 2009

- Market Philadelphia's economic development incentives portfolio for the City's industrial sector
- Manage relationships with clients and oversee their financial and real estate transactions to settlement
- Conduct routine market analysis and report findings to educate colleagues and city officials about the sector
- Maintain outreach network of major lenders, real estate brokers, and government officials

Analyst, Financial Services Group, May 2007 - November 2007

- Coordinated, underwrote, and presented prospective loans for companies expanding in Philadelphia
- Managed six tranches of HUD 108 federal revolving loan dollars and wrote application for a seventh
- Wrote multiple grant applications for state infrastructure improvement programs

School District of Philadelphia, Philadelphia, PA

Special Projects Assistant, Offices of Special Finance & Treasury Operations, November 2004-May 2007

- Assisted in the management and reporting of public investment transactions
- Coordinated and executed the review, approval, and payment of invoices for academic programs and monitored accounts
- Conducted forensic auditing and background investigations on students, charges, placements, and services to ensure proper payment and responsible accounting

Foundations, Inc., Moorestown, NJ

Special Projects Assistant, Executive Office, September 2003 - November 2004

- Served as project and research assistant to the CEO and Chief of Staff of education non-profit organization
- Contributed to various projects including grant applications and results-based accountability

ADDITIONAL SKILLS

Microsoft Office applications, SPSS, and Lotus Notes

LEADERSHIP

Member, Urban Land Institute, October 2007 - Present

Member, Penn State Alumni Association, May 2003 - Present

President, Council of Commonwealth Student Governments Alumni Interest Group, April 2007 - March 2009

Ex-Officio Member, Board of Trustees, The Pennsylvania State University, April 2002 - March 2003

Legislative Intern, The Office of State Representative Lawrence H. Curry, September 1999 - June 2000

HONORS & CERTIFICATES

Phi Kappa Phi National Honor Society, December 2007

The Eric A. and Josephine S. Walker Leadership/Citizenship Award, April 2001

Jennifer Lucas Crowther

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PROFESSIONAL EXPERIENCE

Assistant Vice President, Philadelphia Industrial Development Corp: Philadelphia, PA **June 2008 - Present**

- Evaluated and redesigned a working capital loan product for disadvantaged and minority businesses.
- Developed and implemented a Loan Guarantee Program which enables small businesses to access capital from banks and leverages \$2 million in loans.
- Developed a \$9 million loan program to provide financing to support energy efficiency retrofits and new construction projects for Philadelphia based businesses and nonprofits.
- Developed a \$4.5 million loan program to provide gap financing to support projects that have seen a diminished value in tax credits, reduction in subsidy, reduction in senior lending, or other funding source that prevent the project from moving forward.

Economic Development Fellow, Sports and Exhibition Authority: Pittsburgh, PA **May 2007 – May 2008**

- Prepared a cost analysis on the green building features at the David L. Lawrence Convention Center
- Assisted in the creation of development plans for a \$290 million multi-use arena for the Pittsburgh Penguins – anticipated to be the nation's first LEED certified green arena
- Planned and coordinated 12 events to encourage disadvantaged populations to apply for building trades jobs
- Negotiated license agreements and managed dozens of events in North Shore Riverfront Park
- Supervised the installation of a \$250,000 public art sculpture and arranged a public lecture and reception
- Programmed, redesigned, and updated website using HTML code and Macromedia Dreamweaver software

Outcomes Analyst, PEC Community Development Corporation: Philadelphia, PA **July 2004 – July 2006**

- Coordinated construction process and managed \$1.25 million budget for eight units of affordable rental housing
- Developed and presented testimony on housing related initiatives to Philadelphia City Council
- Generated outcome/indicator reporting and evaluation to foundations, government agencies and funders
- Oversaw the design and implementation of a property/project database (Visual Basic/SQL Server System) to track neighborhood indicators through working with technology/database consultant
- Supervised interns to conduct a neighborhood-based data collection – surveyed over 3,500 properties
- Conducted feasibility studies with consultants on education and arts-based economic development
- Wrote and was awarded grants totaling over \$2 million from diverse funders including the Department of Housing and Urban Development (HUD), William Penn Foundation and the Bank of America

Policy and Advocacy Fellow, People's Emergency Center: Philadelphia, PA **July 2003 – July 2004**

- Tracked and reported on changes in housing and homeless policy, welfare reform and child care
- Provided writing, research, design and implementation support for policy paper on family homelessness
- Coordinated with homeless, affordable housing and welfare coalitions to lobby the U.S. Congress

Policy and Evaluation Fellow, UNU/INCORE: L'Derry, Northern Ireland **May – August 2001**

- Assisted in organizing and implementing four conferences - resulting in publication of handbooks on "Lessons Learned in Reconstruction and Reconciliation"
- Acted as an assistant liaison between grassroots activists, academics and Assembly Members to advocate for conflict-related research to be incorporated into public policy

EDUCATION

Carnegie Mellon University: Pittsburgh, PA

May 2008

H. John Heinz III School of Public Policy and Management

Master of Science in Public Policy and Management

Concentration in Economic Development, Cumulative GPA: 3.97/4.0

Fellowships: Heinz Fellow: Full-Tuition Award for Commitment to the Public Interest *August 2006 – May 2008*

Stephen M. Lauble Fellowship: Public Sector & Economic Development *May 2007 – May 2008*

Haverford College: Haverford, PA

May 2003

Bachelor of Arts in Political Science, Concentration in Peace and Conflict Studies

High Honors, Major GPA: 3.8/4.0; Cumulative GPA: 3.76/4.0,

Institute of European Studies: Vienna, Austria (study abroad)

January – June 2002

RESEARCH EXPERIENCE

Research Assistant, Carnegie Mellon University: Pittsburgh, PA
2008

August 2006 – May

- Investigate the impact on crime and inter-city migration resulting from the demolition of public housing throughout Pittsburgh (assisting Professor Wilpen Gorr)
- Collect quantitative data on inter-city migration, crime and social services using resources such as the Allegheny County Department of Human Services Data Warehouse

Green Project Manager and Editor, Carnegie Mellon University: Pittsburgh, PA

August 2007– May 2008

- Work with a student team to produce a report outlining an economic revitalization strategy for Wilkinsburg, PA
- Conduct a historical statistical analysis to determine the correlation between the property tax rate and other variables such as population loss, foreclosure rate, and vacancy rate
- Assess the feasibility of using tax abatement programs and green initiatives as tools of economic revitalization

AWARDS & RECOGNITION

Phi Kappa Phi Honor Society: Carnegie Mellon University Chapter

April 2008

Phi Beta Kappa: Pennsylvania Chapter

May 2003

Herman M. Somers Thesis Award: Exemplary Senior Thesis in Political Science

May 2003

Haverford House Fellowship: Community Service and Employment Program

July 2003 – July 2004

Peace & Global Citizenship Fellowship: Fieldwork on Reconciliation Policies

May – August 2001

COMMUNITY INVOLVEMENT

Marketing Associate, Carnegie Mellon's "Heinz School Review:" Pittsburgh, PA

August 2006 – May 2008

- Design and implement a marketing strategy for the "Heinz School Review," a student-run policy journal, through the use of press releases, informational posters, online media and publicity fliers
- Host "Heinz Review" launch events at Carnegie Mellon University's Alumni and Visitation Weekends

Haverford House Fellow, Haverford House: Philadelphia, PA

July 2003 – July 2004

- Implemented programs with team to nurture new connections between Haverford College, the City of Philadelphia and community-based organizations by coordinating alumni networking sessions and recruiting organizations to host future fellows

Teaching Assistant/Intern, Peace & Global Citizenship: Haverford, PA

January 2001 – May 2003

- Trained new interns for fellowships abroad as well as designed and implemented internship evaluation process
- Led and facilitated class dialogue and small group sessions: Peacebuilding Course, Fall 2001

SKILLS

Operating Systems: Windows 98, Windows 2000, Windows XP, and Vista

Software Packages: Microsoft Office applications: Access, Excel, Outlook, Project, PowerPoint and Word
Macromedia Dreamweaver 8, Paint Shop Pro 9, HTML Script, Minitab, and SAS

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Nancy J. DAY
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Philadelphia, PA 19136
215-333-0543

Education

Frankford High School, Oxford Avenue, Philadelphia, PA
Fleisher School of Art, Catherine Street, Philadelphia, PA

Experience

Philadelphia Industrial Development Corporation - May 1998 – Present
1500 Market, Philadelphia, PA 19102

Portfol Manager

- Insurance Monitor
- Employment Monitor
- Loan Monitor
- Internal and external Portfol software support.
- Generates internal reports
- Create and maintain access database
- Research data and program resources
- Manage data; capture stats for quarterly reports

Bustleton Eye Associates – Sept 1986 – May 1998
Bustelton Avenue, Philadelphia, PA 19152

Office Manager

- 3rd Party Insurance Billing
- Patient preparation
- Receptionist
- Appointment scheduling
- Process patient billing

Talco Metals – January 1984 – June 1986
Unruh Street, Philadelphia PA 19149

Accounting

- Process customer billing
- Accounts Receivables



B. Joan Dougherty

Objective

To make available funds from public sources for use in industrial neighborhoods to further the needs of the surrounding community.

Experience

1997 to Present Philadelphia Industrial Development Corporation
Urban Industry Initiative Phila., Pa.

Financial Services / Lender/Consultant

Initially Consultant to Manufacturers in UII target Area.

Duties expanded to city-wide in 2000

Lending under PIDC and UII policy includes interviewing clients, analysis of financial statements, preparing and presentations to loan committee, interaction with Pa. State personnel, lawyers and accountants.

1988 to Feb. 1997 Frankford Bank, N.A. Phila., Pa.

Vice President/Lender/Commercial Credit Manager

Developed \$2MM small business portfolio of credits, \$125,000 or less, including start-ups, and many difficult to place community based businesses.

Responsible for credit analysis, documentation, and collateral records

Supervised a staff of five

Member of Loan Committee

1985-1988 Bank Leumi Le Israil B.M. Phila., Pa.

Assistant Vice President/Commercial Credit Manager

Responsible for Commercial and Consumer Credit Administration/Loan Accounting Reporting/Documentation and Collateral Control

Assisted Loan Review and Recovery

Supervised a Staff of four

Member of Loan Committee

1969-1985 Meridian Bank (Formerly Central Penn Bank) Phila., Pa.

Assistant Cashier/Commercial Credit Manager

Responsible for Commercial Credit Administration

Supervised a Staff of fifteen

Taught RMA Omega to Credit Analysts and Management Trainees

Education

1977-1980 LaSalle University Phila., Pa.

B.S., Finance with a minor in Economics

Graduated Magna Cum Laude - May 1980

Carol J. de Fries

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Philadelphia, PA 19145

(215) 385-1170

Email: carol.defries@gmail.com

PROFESSIONAL EXPERIENCE

Philadelphia Industrial Development Corporation (PIDC), Philadelphia, PA
Vice President, Market Development

3/07-present

Responsible for the economic development of Philadelphia's growing and dynamic cultural, civic, and non-profit sector. Manage relationships with more than 200 clients in the delivery of PIDC's financing and real estate services. Negotiate with management, real estate, and financing professionals in the development of new facilities, renovation of existing buildings, and the purchase of real estate. Work with Philadelphia's higher education and medical community in achieving their campus expansion plans. Assist non-profit organizations with state and City capital grant processes and advise organizations on how to access these funds. *Accomplishments include:*

- Oversee the administration of the City's new Cultural Corridors Program and the award of \$80 million in grants to cultural organizations in Philadelphia.
- Facilitated and completed the Barnes Foundation lease agreements with PIDC and the City for the construction of a \$150 million art education facility on the Parkway.
- Worked with the Philadelphia International Airport and City to facilitate a \$45 million expansion of Southwest's terminal, \$90 million in upgrades to US Airways facilities, and \$20 million in new concession improvements in airport terminals.

University of Pennsylvania, Philadelphia, PA

Executive Director, Office of Government, Community and Public Affairs

7/99 – 2/07

Advanced Penn's interests with regards to the Federal, State, and City governments, community organizations, higher education associations, and civic organizations to which Penn belongs. Coordinated annual strategic plan for office, staff projects and new policy development initiatives for Vice President. Prepared policy and issue briefings for University's President and Vice President and advised on strategies. Staffed Trustee committees for external affairs and neighborhood initiatives. Managed office communications and public relations to senior university administration, trustees, faculty, staff, and students, external constituencies, and government and civic leaders. *Accomplishments included:*

- Monitored \$1.6 million budget and served as the Vice President's chief of staff of 15 professional and administrative personnel.
- Directed Department during three-month vice president search process.
- Coordinated Penn's broad Philadelphia economic development priorities with various external organizations. Organized with Temple University, the Governor's Conference of Pennsylvania's University and College Presidents, including creation of proposals for new state economic development programs that would enhance higher education's role in Pennsylvania's growth.
- Managed department's marketing and public relations materials including the creation of Penn's "Community Services Directory" and companion website, and the "University of Pennsylvania Partnerships with the West Philadelphia Public Schools" brochure.

Commerce Department, City of Philadelphia, Philadelphia, PA
Special Assistant to the Director of Commerce

5/95 - 7/99

Managed special economic development initiatives, external affairs, and public relations for the Commerce Department. *Responsibilities included:*

- Prepared Director for briefings with the Mayor, Council members, Governor, federal officials, other elected and appointed officials at all levels of government, corporate, media and international dignitaries via presentations, issue papers, written testimony, and speeches.
- Directed operations for the Mayor's Economic Development Cabinet and its Executive Committee.
- Created marketing and public relations plans that highlighted positive city business activity.
- Organized Mayoral media events, prepared press releases and articles for publication, produced advertisements and marketing collateral material for the Mayor's Business Action Team.
- Co-chaired the Philadelphia College Student Retention Committee, an initiative created to retain graduate and undergraduate students in Philadelphia after graduation and highlight Philadelphia's colleges and universities as a major asset for businesses.

Chemonics International Consulting Division, Washington, DC
Procurement Administrator

4/92 - 8/94

Managed and executed commodity contracts valued at \$2.4 million annually for over 30 United States Agency for International Development (USAID) funded projects worldwide. Proven track record for meeting and exceeding project deadlines. *Duties included:*

- Consulted with project management to assess objectives, recommend strategy, expedite procurement process, and advised on the implications of federal and international regulations and other constraints.
- Evaluated bids and offers based on cost and applicable qualitative factors, negotiated with suppliers, and established professional relationships with international consultants, government procurement staff, contractors and freight forwarders.

Procurement Assistant

5/90 - 3/92

EDUCATION

University of Pennsylvania, Fels Center of Government, Philadelphia, PA
Master of Government Administration, May, 1996.

Georgetown University, College of Arts and Sciences, Washington, DC
Bachelor of Arts in Government, May, 1989.

HONORS

Philadelphia Business Journal 2001 "Forty under Forty" Recipient.

BOARDS & ACTIVITIES

- Campus Philly, formerly "Knowledge Industry Partnership" (*Chair* 2002 - present)
- Newbold Community Development Corporation (2005 - present)
- Girls Inc. of Greater Philadelphia and Southern New Jersey Board Member (2000 - 08)
- Young America PAC (2002 - 2005)
- Fund for Philadelphia (2003 - 2007, *Secretary* 2004 - 2007)

Lisa Gramiak
9213 Pine Road
Philadelphia, PA 19115
(215) 673-1710

EXPERIENCE

9/81 – Present

Philadelphia Industrial Development Corporation Philadelphia, PA

Loan Administrator/Assistant to Vice President

Prepares transactions to be presented to PIDC's Loan Committee and prepares fact sheets to be presented to PIDC's Board of Directors. Responsible for initiating and tracking approvals for transactions, interact with City and State Officials on obtaining approvals, prepare client for settlement which includes drafting and issuing commitment letters, reviewing invoices for disbursement of funds, preparing check requests for disbursements. On average monitors 30 transactions at a time. Consistent contact with company executives, attorneys and various company personnel as it relates to the loan closing process. Provides support to the Vice President of Lending. Also responsible for maintaining portfolio database and audit files.

Administrative Assistant to Senior Vice President

Responsible for processing bills for the City, handling internal phone bills, maintaining insurance files, company cars, internal equipment, petty cash and assisting Senior Vice President in day-to-day duties.

Insurance Monitor

Responsible for maintaining insurance files for over 1,000 transactions along with consistent interaction with insurance industry personnel.

Program Assistant and Assistant to Vice President

Prepare and process approvals for transactions, track disbursement of funds, prepare reports for numerous City and Federal agencies. Assist Vice President in day-to-day duties.

Secretary/Financial Services

Typing, filing, scheduling appointments and answering phones for Vice President and other staff. Proficient in Word and Excel.

EDUCATION

1978 – 1981

Graduated from Frankford High School, Philadelphia, PA

**OTHER
INTERESTS:**

Sports, reading, gym and music

Tracy L. Horton

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thorton1978@gmail.com

Experience

Philadelphia Industrial Development Corporation (PIDC)

Philadelphia, PA

Intern, Finance Group

05/09-Present

- Manage complex project finance transactions. A representative transaction is a \$37 million supermarket and retail complex for which PIDC is providing financing through a HUD 108 loan, Brownfield Economic Development Initiative funds and New Markets Tax Credits.
- Determine project eligibility for economic development programs, consistency with internal policies and priorities, and financial viability. Examples include a proposed supermarket and mixed retail development in an underserved low-income community and a planned mixed retail and residential use of an historic building in an area targeted by the city for economic revitalization.
- Research federal, state and local economic development funding programs. Analyze and explain requirements and parameters of programs in memoranda that senior staff use to formulate internal policy and implementation strategies.

City of Philadelphia Law Department

Philadelphia, PA

Volunteer, Tax Unit

11/08-05/09

- Provided part-time, pro bono legal services related to tax collection initiatives. Drafted memoranda on Pennsylvania regulations and other states' practices for inter-agency distribution. Reviewed legal briefs.

Weil, Gotshal & Manges LLP

New York, NY

Associate, Corporate

03/06-05/08

- Represented issuers, underwriters, collateral managers and monoline insurance companies in all aspects of complex securitizations including, CDO's, CDO²s, asset backed securitizations and derivative transactions, ranging in size from \$400 million to over \$1 billion. Negotiated, drafted and reviewed offering memoranda, indentures, credit default swaps and other transaction documents, managed deal teams, coordinated closings. Representative clients included: Barclays Capital, Cohen & Company, Financial Security Assurance Holdings Ltd., Lehman Brothers, Merrill Lynch & Co, Morgan Stanley, Stone Tower Capital LLC, T2 Advisers, LLC.
- Represented major rental-car company in all aspects of asset backed securitization program, including auction rate notes, variable funding notes, agreements with automobile manufacturers, various amendments to securitization documents and securitization issues raised by acquisition of client by rival rental-car company.
- Represented GE Capital in multiple acquisitions, including the purchase of Merrill Lynch Capital and the \$13.4 billion asset acquisition of most of CitiCapital. Drafted high level securitization issues memos for use of senior management, reviewed and summarized securitization documents, managed structured finance diligence teams.
- Advised monoline insurance company with respect to residential mortgage backed securitization exposure. Drafted issues memos and summaries of findings for use of senior management, participated in presentations to senior management, drafted notice and demand letters, managed diligence team.
- Assisted international NGO in the development of micro-insurance program in Africa. Researched best practices and applicable laws and regulations, participated in status calls with client.
- Updated and revised chapters of *Bringing Rights to Bear: An Analysis of the Work of UN Treaty Monitoring Bodies on Reproductive and Sexual Rights*, published by the Center for Reproductive Rights. Reviewed and summarized comments, statements and recommendations of the UN treaty monitoring bodies.
- Awarded Weil Gotshal Pro Bono Service Award for 2006 and 2007.

Chadbourne & Parke LLP

New York, NY

Associate, Project Finance

09/04-03/06

Summer Associate

05/03-08/03

- Conducted research for and drafted sections of successful bids to assist Millennium Challenge Corporation with implementation of its infrastructure aid programs in Armenia, Benin, Cape Verde and Vanuatu.

- Represented investors in acquisition and further development of wind-powered energy plant in Texas. Drafted construction management agreement, membership interest purchase agreement and due diligence memorandum. Reviewed and revised other project and financing documents, including syndication services agreement, balance of plant agreements and turbine supply agreement.
- Represented syndicate of international lenders in multi-million dollar merger, capitalization, refinancing and corporate restructuring of equity and control of Venezuelan steel corporation.
- Represented General Electric in lease commencement portion of sale-leaseback of gas-fired power plant.
- Awarded Chadbourne & Parke LLP Pro Bono Award for 2004 and 2005.

Education

Columbia Law School

New York, NY

J.D., May 2004

Activities: • *Journal of Transnational Law* – Public Affairs Editor
 • Society of International Law

Awards: • The Parker School Certificate for Achievement in International and Comparative Law

Northwestern University

Evanston, IL

B.A., History and International Studies, June 2000

Publications

- Co-Authored chapter entitled "Utilizing Structured Financing Techniques" in *Reorganizing Failing Businesses, Revised Edition* (2006).
- Co-authored: "Toll Road Update," *Project Finance Newswire*, October 2005; "Ocean Energy: Whose Approval is Needed," *Project Finance Newswire*, August 2005.

Other Information

Bar Admission: New York, 2005

Member: American Bar Association; New York State Bar Association

JOHN D. LENAHAN

735 Rively Avenue, Glenolden, PA 19036 * (215) 790-2230 - Business * (610) 532-8679 - Residence

PROFILE

- Strong credit analysis and interpersonal skills acquired over 33 years of progressive commercial lending activity and departmental management responsibilities.
- Extensive experience in developing and implementing community development and small business lending initiatives.
- Broad knowledge of various loan programs offered by public entities such as the Small Business Administration (7a and 504 loan programs), the PA Department of Community and Economic Development (Small Business First, PIDA, and MELF), and local economic development organizations (PIDC, The Reinvestment Fund, and Ben Franklin Technology Partners).

PROFESSIONAL EXPERIENCE:

September, 2009 – Present

Vice President of Lending

PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION (PIDC)

Philadelphia, Pennsylvania

As Vice President of Lending at PIDC, Mr. Lenahan is responsible for the direct supervision of four financial analysts/loan officers within PIDC's lending department. As the Chief Credit Officer, Mr. Lenahan plans, directs, and coordinates all departmental policies and procedures with respect to financial packaging and lending.

February, 1984 – Present

Vice President

PHILADELPHIA COMMERCIAL DEVELOPMENT CORPORATION (PCDC)

Philadelphia, Pennsylvania

Responsible for the direct supervision of four (4) professionals comprising the Lending Department of the Corporation. Manage an existing term loan and credit line portfolio in excess of \$15.0 million. Plan, direct and coordinate all departmental policies and procedures with respect to financial packaging, lending, loan servicing, management consulting, and business development activities. Work with the Fiscal and Legal Departments to prepare annual contract scopes of work for various programs as well as overall departmental budget. Review and interpret federal and state laws and regulations governing the administration of the department's various public funded programs and insure compliance with same. Prepare monthly, quarterly and annual performance reports for Board of Directors and various funding sources. Develop performance goals for program managers and staff and conduct interim and year end personnel evaluations. Work with staff to address and resolve problems involving client relations.

Major Accomplishments

- Promoted from Senior Loan Officer to Manager of Small Business Services within two years of joining the corporation and to Vice President of Lending three years thereafter.
- Oversaw the processing, review and approval of over \$100 million in lending activity as Small Business Services Manager and Vice President of Lending.
- Improved Agency's loan productivity by 250% via a combination of increased loan activity and a 50% reduction in departmental staffing.
- Established and maintained excellent relationships with borrowers, participating lending institutions, loan committee members, and funding sources.

- Served as Chairman of the Loan Policy Committee which produced the first comprehensive loan policy manual for the corporation's five major loan programs.
- Developed underwriting and loan collection procedures in concert with the Agency's Legal Counsel that resulted in a 66% decrease in loan delinquencies.

February, 1979 – January, 1984

Associate Director of Finance/Business Consultant
MID-ATLANTIC TRADE ADJUSTMENT CENTER
 Philadelphia, Pennsylvania

Responsibilities included the financial analysis and strategic evaluation of client firms with revenues ranging from \$3.0 to \$30.0 million. Worked closely with client's senior management to identify and pinpoint operating inefficiencies and to structure business plans designed to improve corporate performance and productivity. Where appropriate, negotiated financing arrangements necessary to strengthen the firm's competitive position within its industry. Acquired considerable experience in statement and cash flow analysis, working capital and capital expenditure evaluations and budgeting and forecasting techniques.

August, 1976 – January, 1979

Financial Analyst
MAINSTREAM ENTERPRISES BUSINESS DEVELOPMENT CENTER
 Philadelphia, Pennsylvania

Responsible for performing credit evaluations and developing financial assistance proposals for small businesses. Also served as a member of the Small Business Administration's Portfolio Servicing Committee.

EDUCATION

September, 1972 to May, 1976
 Villanova University
 College of Commerce and Finance
 Villanova, Pennsylvania

B.S. Degree in Business Administration
 Magna Cum Laude – May, 1976
 Major: Industrial Management

AWARDS AND ACHIEVEMENTS

Departmental Key award for distinguished scholarship in Business Administration
 Elected to Phi Kappa Phi National Honor Society – April, 1975
 Elected to Beta Gamma Sigma National Honor Society – April, 1976

SPECIAL TRAINING PROGRAMS

National Development Council's "Business Credit Analysis"
 National Association of Development Companies "SBA 504 Loan Packaging & Credit Analysis"
 Gap International's Breakthrough Intensive Training

SUSAN CASEY LOWRY

823 N. Bucknell Street • Philadelphia, PA 19130

Cell: 918-289-4769

lowry.susan@gmail.com

PROFESSIONAL QUALIFICATIONS

Strong focus on team building, personal ethics, leadership, and goal setting. Excellent communication and multi-phased project management execution skills. Demonstrated problem solving and analytical ability. Team orientation with a proactive, but collaborative approach to identifying market trends, demographic changes, sustainable solutions and opportunities within both existing and prospective clients/markets. Ability to deliver “first to market” critical data platforms. Strong presentation skills.

EDUCATION

The University of Tulsa, Tulsa, OK

BA Communication with minors in Marketing and Spanish 5/03

Universidad de Malaga, Malaga, Spain

Participant in an intense Summer Abroad Immersion Program – Spain 2001 (*certificate*)

The University of Tulsa, Tulsa, OK

MBA Program with emphasis on *Marketing* (*withdrew due to relocation 5/04*)

EXPERIENCE

7/08 –Present Philadelphia Industrial Development Corporation, Phila., PA – Director of Marketing

- Manage and supervise the economic development marketing efforts of PIDC
- Manage the PIDC Annual Report from draft to print production
- Coordinate PIDC marketing initiatives with other Philadelphia city agencies
- Direct and manage all client inquiries as the client relations contact
- Co-managed the redesign and development of The Philadelphia Navy Yard website (www.navyyard.org)
- Active member within the Philadelphia market research community – Help organize quarterly meetings on relevant real estate and development topics and lead discussion
- Direct event planning for marketing of financing programs, press events, market development and Navy Yard tenant events
- Coordinate Response for Proposals (RFP's) on behalf of the City of Philadelphia and PIDC for potential corporate attraction, retention and financing opportunities within various industries sectors both national and international presence
- Lead the “rebranding” initiative of PIDC to give the company a unified and cohesive look among all print materials

6/07 – 7/08 Studley, Inc. – Phila., PA – Public Relations & Marketing (*additional to Market Research*)

- Supervise Philadelphia Branch PR and Media Relations
- Communicate with both SVP of Marketing and Director of Public Relations at corporate headquarters regarding local office updates and budgets
- Communicate with Studley's outside Public Relations firm to define possible press opportunities and media placements
- Approve placement of company advertisements or sponsorships in various regional publications

7/04 – 7/08

Studley, Inc. – Phila., PA – Market Research Analyst

- Supervise branch market research, GIS mapping, demographic and data base information
- Daily interface with corporate and branch senior management, brokers and affiliate branch offices in dissemination and analysis of market data and trends
- Serve on Studley's Corporate *Market Research Focus Group*
- Selected to participate in a quarterly Advisory Board by the *CoStar Group* to discuss market statistics and real estate trends
- Author of the Quarterly Philadelphia Studley Market and Spacedata Report and annual SERI report
- Participate in corporate research, training of other Studley researchers, and client presentations

8/03 – 5/04

The University of Tulsa – Tulsa, OK – 2'nd Assistant Women's Rowing Coach

- Involved in daily coaching of 30-40 student/athletes at the Division 1 level
- Regular interface with University Admissions, Academic Services and Compliance
- Traveled nationally to recruit athletes for The University of Tulsa (TU) rowing program
- Significant involvement with special event fundraising and public relations

SPECIAL PROJECTS

- Manage and participate in PIDC's office activities such as the softball team and Broad Street Run participation
- Organized Studley's participation in Lee National Denim Day fundraising event supporting the cure for breast cancer in both 2005, 2006 and 2007
- Organized Studley's participation in the NK Challenge - An 18 mile rowing fundraiser to support a rowing program for inner city youth in Philadelphia
- Organized 2004 TU *Row for Humanity* Fund Raising Event to support Tulsa's local Habitat for Humanity chapter

ACTIVITIES/LEADERSHIP

- Serve on the Philadelphia Chamber of Commerce "Small Business Excellence Awards" Committee
- Member of Urban Land Institute
- Member of the US Green Building Council
- Selected Member of the CoStar Advisory Board – Philadelphia Region
- Member of TriState Realtors Commercial Alliance
- Member Undine Barge Club, Philadelphia, PA – High Performance Rowing Team, 2004-2008
- Fitness Instructor – Sporting Club at the Bellevue – Philadelphia, PA, 2007-present
- Assistant Novice Coach - Conestoga Crew Club, 2008 season
- Volunteer Coach – Conestoga Crew Club, 2009 Season

AWARDS/RECOGNITION

- 2007 Nominee for Studley Employee of the Year
- 3 time United States Rowing National Champion and 4 time International Gold Medalist, 3 time and current Gold Medalist - The Head Of The Charles Regatta

CERTIFICATIONS**LEED AP Certification 3/09****Pennsylvania Real Estate Salesperson License 5/06** (*Temple University – Philadelphia, PA*)

US Rowing Level II Coaching Certification 2/04

JOSEPH A. MEE

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Philadelphia, PA 19115

Office: (215) 496-8152 Home: (215) 464-8557 Cell: (215-360-2958)

e-mail: jacor@pidc-pa.org or meejoemee@comcast.net

WORK EXPERIENCE:

1986 To Present: **PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION (PIDC)**
Philadelphia, PA

1997 to Present: **Vice President - Lending**

- Chief Credit Officer (2000 -2009)
- Chief Administrative Officer (2000 – Present)
- Chief Loan Workout Officer (1990 – Present)
- Loan Administrator of the Philadelphia Welcome Fund/\$180,000,000 loan pool
- Property Manager for properties valued at \$10,750,000
- Portfolio Manager for over 1,890 loans with total original value of over \$1,138,000,000, current balances of \$480,000 and a default rate of 3.95%.
- Currently serve as Assistant Secretary & Assistant Treasurer of all corporate entities
- Assisted in authoring agency credit manual.
- Responsible for coordination of all Loan Committee and Board activities
- Supervise five people in regards to all business lending activities
- Annually review financial statements of all open loans in portfolio
- Collected over \$60,000,000 in PIDC tenure
- Constant contact with company President's, Senior Management, Accountants, Lawyers, Title Companies, Bankers & Real Estate Brokers.

1990 to 1997

Director of Loan Administration and Collections

- Compliance Manager for all agency governmental loan programs
- Assisted in securitization of \$7,000,000 in loans
- Liaison for all Federal, State and Local Development Programs
- Supervise six people
- Reduced delinquent accounts by 20% over 40 month period
- Work extensively with company Presidents, Senior Management, Attorneys and Accountants
- Coordinated closing of over 600 transactions
- Participated and Testified in Bankruptcy Court Proceedings
- Workout of all delinquent loans
- Responsible for Board and Loan Committee Agenda Preparation

1986 to 1990

Financial Analyst

- Analyzed company statements and performed credit analysis for all loan transactions
- Prepared presentation to Senior Management and Loan Committee on financial transactions
- Negotiated numerous loan-related issues with clients and representatives
- Coordinated and supervised of all loan transactions.

1982 to 1986

MERRILL LYNCH PIERCE FENNER AND SMITH

Philadelphia, PA

Customer Accountant

- Worked with 5,000 customer accounts
- Provided troubleshooting and problem-solving support services to 40 retail stockbrokers, their clients and Home Office
- Reduced delinquent accounts by 25% during tenure
- Reduced compliance issues by 15% during tenure
- Provided research and analysis to Operations Center Senior Management.

1979 to 1981

THOM McCAN SHOE COMPANY

Worcester, Massachusetts

Assistant Regional Merchandiser

- Provided support services to 145 retail stores
- Monitored, supervised and supplied inventory for each store
- Budget preparation and analysis for Mid-Atlantic Region
- Responsible for planning future shoe lines in conjunction with buyers for Mid-Atlantic Region

1977 to 1979

PHILADELPHIA POLICE DEPARTMENT

Philadelphia, PA

Patrol Officer

- Reduced overall crime in sector by 20% in conjunction with two other officers during tenure
- Made numerous felony, misdemeanor and summary arrests
- Testified in criminal court proceedings
- Organized and planned numerous social and charity functions

EDUCATION:

1992

LASALLE UNIVERSITY

Philadelphia, PA

M.B.A. Finance (GPA 3.10)

1977

PHILADELPHIA COLLEGE OF TEXTILES AND SCIENCES

Philadelphia, PA

B.S. Marketing & Accounting (GPA 2.85)

1973

NORTHEAST CATHOLIC HIGH SCHOOL FOR BOYS

Graduated with Distinction

TECHNOLOGY: Sound working knowledge of Windows XP, Excel, and Word
Interests include running, reading, basketball, coaching and the Stock Market.

ANNE BOVAIRD NEVINS

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PROFESSIONAL EXPERIENCE

PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION (PIDC)

Philadelphia, PA

Vice President, Market Development

2009 – Present

Assistant Vice President, Market Development

2007 – 2008

- Develop and oversee relationships with businesses and real estate developers in Center City Philadelphia, focusing on the office, hospitality and retail sectors. Lead clients through initial deal structuring, application, approval and settlement process for financing and real estate transactions. Responsible for more than \$15 MM in settled financing transactions leveraging approximately \$100 million in private investment, including a new 230-room upscale boutique hotel opening in October 2009.
- Manage proactive efforts to retain major office tenants in the central business district, resulting in the retention of 36 corporations since 2007. Presented on PIDC's programs and services to 35 real estate brokerage and law firms in the past two years. Writing a new marketing publication to promote Philadelphia as a premier business location.
- Analyzed the impact of Philadelphia's tax structure on financial sector firms and recommended changes to make the city a more competitive location for that industry. Attracted two financial sector firms to Philadelphia in 2008 with employment representing more than \$50 MM in taxable annual wages.
- Engaged with more than 15 real estate developers with active proposals for new hotels to serve the expanding Pennsylvania Convention Center. Secured \$10 MM in state grants for two Center City hotel projects in 2008.
- Managing RFP process for a market study on entertainment venues in Center City to analyze the feasibility of a \$35 MM project to redevelop an existing historic building into a live entertainment destination.

HISTORIC PHILADELPHIA, INC.

Philadelphia, PA

Director of Development

2005

- Created and implemented strategic fundraising campaign for \$8 MM start-up initiative and capital project to renovate underutilized 8-acre park site, create a new heritage tourism attraction, and re-brand the experience of Philadelphia's historic district. Raised more than \$1.65 million from corporate, foundation and individual sources in six months.
- Maintained and strengthened relationships with sponsors representing \$7 MM in pledges, developed comprehensive sponsorship benefits packages, and produced three events resulting in positive sponsor feedback and additional lead generation.

KIMMEL CENTER, INC.

Philadelphia, PA

Associate Director, Corporate Sponsorships

2004 – 2005

Corporate Relations Manager

2003 – 2004

- Designed and managed a new strategic plan for increasing annual giving in the corporate sector. Created promotional materials and systems for fundraising campaign that increased corporate annual fund contributions by more than 50% in one year.
- Led solicitations for \$50,000+ corporate sponsorships and operating support. Prepared and presented proposals and supporting materials and managed follow-up for sponsorship campaign to achieve revenue goal of \$1.2 million annually.
- Created marketing promotions, employee benefit programs and community outreach events with corporate sponsors.
- Solicited corporate sponsorships for Annual Gala events in conjunction with a Corporate Committee composed of twenty top CEOs and business leaders in the Philadelphia region.

SALT LAKE ORGANIZING COMMITTEE FOR THE 2002 OLYMPIC WINTER GAMES

Salt Lake City,
UT

Domestic Dignitary Program Manager

2002

Federal Relations Coordinator

2001 – 2002

- Served as liaison to federal agencies on international entry procedures for Olympic athletes and officials, Olympic-related education programs for Utah students, and federal funding for the Games.
- Organized attendance at the 2002 Olympic and Paralympic Winter Games by the U.S. President, Vice President, Cabinet officials and members of Congress, including security arrangements, logistics and protocol.
- Managed 10-person staff of employees and volunteers to provide customized logistical arrangements and hospitality services for dignitaries attending the Games.

THE WHITE HOUSE, Office of Cabinet Affairs
Director of Special Projects
Special Assistant to the Cabinet Secretary

Washington, DC
2000 - 2001
1999 - 2000

- Coordinated activities of task force comprised of 27 federal agencies responding to resource needs for the 2002 Olympic Winter Games in Salt Lake City, including transportation, security, and international entry procedures.
- Attended and organized Cabinet meetings and prepared related briefing materials and talking points for the President and Chief of Staff.
- Arranged Cabinet participation in Presidential initiatives, events, and travel. Accompanied and provided logistical support for members of the Cabinet who traveled with the President and First Lady to England and Ireland in 2001.

EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA
Master of Business Administration; Major in Real Estate

Philadelphia, PA
2007

- Palmer Scholar, indicating academic achievement in the top 5% of the MBA graduating class.
- Co-President, Sports Business Club; Director of Client Development, Wharton Community Consultants; Director of Strategy, Summer Public Interest Fund; Event Director, Wharton Women in Business 2005 Conference.

UNIVERSITY OF PENNSYLVANIA

Bachelor of Arts in Political Science, Minor in Economics, summa cum laude, GPA: 3.88

Philadelphia, PA
1999

- Member, Phi Beta Kappa.
- Started as Volunteer Coordinator and was promoted to Director of Scheduling and Advance for a successful congressional campaign. Took a one-semester leave of absence and graduated on time. (Fall 1998)
- Intern, The White House, Legislative Affairs Office of the Vice President (Spring 1998 - Penn in Washington DC).
- Intern, The White House, Office of Cabinet Affairs (Summer 1997).

ADDITIONAL PROFESSIONAL EXPERIENCE

- Only non-City employee asked to serve on the staff of the Mayor's Task Force on Tax Policy and Economic Competitiveness (2009).
- Member of advance team for former President Clinton during travel to Philadelphia for events (2004 - present).
- Managed visit by former President Clinton to Malawi to launch new international development initiative for the Clinton Foundation (2006).
- Served as MBA summer associate in the University of Pennsylvania's Facilities and Real Estate Department (2006).
- Consulted to the 2006 Olympic Winter Games in Turin, Italy on the development of a dignitary hospitality and logistics program (2004).
- Managed logistics and oversaw 150+ volunteers for the Inaugural Ceremony of Pennsylvania Governor Edward G. Rendell (2003).

BOARDS AND COMMITTEES

- Executive Committee of the Board of Directors of the Fairmount Community Development Corporation (2009).
- Chair, Financing and Incentives Sub-Committee, Philadelphia Retail Marketing Alliance (2009).
- Executive Committee, Urban Land Institute (ULI) Young Leaders Group, Philadelphia District Council. Launched a leadership exchange program between ULI District Councils in Philadelphia, Washington DC, New York, and Boston (2008 - 2009).

SAMUEL V. RHOADS

Home:

8317 Anderson Street
Philadelphia, PA 19118
Phone: 215/753-0572

Work:

2600 Centre Square West
1500 Market Street
Philadelphia, PA 19102-2126
Phone: 215/496-8132
Fax: 215/977-9618
Email: srhoads@pidc-pa.org

PROFESSIONAL EXPERIENCE

1/02 – present **Senior Vice President, Philadelphia Industrial Development Corporation**
Philadelphia, Pennsylvania

In charge of client relations for real-estate development projects throughout the City of Philadelphia. Responsibilities include marketing and outreach to prospective developers and coordination of financing assistance, land sales and real-estate development services to developer clients. Developer clients include for-profit real-estate developers, community-based development groups, non-profit institutions, and for-profit corporations with development needs. Significant projects include \$1 billion expansion of the Philadelphia Sports Stadium District, disposition of the former Civic Center site in University City for state-of-the-art health care and research facility and major neighborhood and center-city based industrial, commercial, and retail development.

1/95 – 12/01 **Vice President, Philadelphia Industrial Development Corporation**
Philadelphia, Pennsylvania

Responsible for: financial structuring and negotiation of public loans to major real-estate development projects in Philadelphia. Structured financing for six major center-city hotel projects and PNC Bank's new operations center leveraging project costs of over \$500 million. Developed the Tax Increment Financing (TIF) program for the City of Philadelphia.

6/93 – 12/94 **Lending Officer, New Jersey Economic Development Authority**
Trenton, New Jersey

Responsible for program design, review and approval of loan documents, loan disbursal and project monitoring, and internal and external program reporting for Public Lending Unit. Closed and monitored 350 loans and 30 grants totaling \$350 million to New Jersey School Districts and local governments under an innovative, state-wide public funding program.

9/88-1/91 **Program Director, Shared Housing Resource Center**
Philadelphia, Pennsylvania

Provided technical assistance to community-based development corporations in Philadelphia and Delaware Valley on site acquisition, zoning, project finance, construction oversight, tenant selection and management model design of affordable housing. As Acting Executive Director from February 1990 to July 1990, was responsible for agency budgeting financing, staff management, policy and board relations.

9/86-6/88 **Junior High School Teacher, Mathematics, Crane School**
Santa Barbara, California

Taught arithmetic, algebra and geometry to fifth through eighth grades. Other duties included curricula evaluation, coaching and supervising week-long field-trips. Assisted to initiate math field day program.

AFFILIATIONS

1996 Graduate of Leadership, Inc.
1997 – Member of the Board, Philadelphia Urban Finance Corporation
1997 – 2004 Member of the Personnel Committee, Philadelphia Yearly Meeting
2002 – 2005 Member of the Board, Friends Hospital
2003 – Trustee, Germantown Monthly Meeting
2004 – Member of the Board, Awbury Arboretum
2004 – Member of the Board, Wistar Institute
2004 – Member of the Board, Wyck House
2005 – Chair of the Board, Thomas Scattergood Behavioral Health Foundation

LECTURES ON URBAN ECONOMIC DEVELOPMENT

3/99 Empowerment Zones, Round II: Implementation Workshop: Washington DC
4/99, 4/01, 3/03 Swarthmore College: Swarthmore, PA
6/99 London Development Partnership: London England
11/99 Commercial Real Estate Executive Conference: Washington DC
5/01 Counselors of Real Estate: Philadelphia, PA
11/02 Princeton University: Princeton, NJ
4/03, 5/04 Drexel University: Philadelphia, PA

EDUCATION

Graduate: **Woodrow Wilson School of Public and International Affairs, Princeton University:**
Princeton, New Jersey
Received Masters in Public Affairs and Urban and Regional Planning, June 1993. Thesis on small business incubators.

Law School: **Temple University School of Law: Philadelphia, Pennsylvania**
First year completed, 1990-91. Dean's List.

Undergraduate: **Stanford University: Stanford, California**
Received Bachelor of Arts, June 1986 in interdisciplinary, individually designed major: Values Technology, Science and Society.

High School: **Germantown Friends School: Philadelphia, Pennsylvania.** Diploma, 1982.

DONNA LEE SMITHERS, CPA
1845 Wynnewood Road
Philadelphia, PA 19151
Work (215) 496-8136 Home (215) 473-4881
Cell (215) 910-0496

EDUCATION:

University of Pennsylvania	Master of Government Administration - May, 1993
La Salle University	B.S. Accounting - May, 1984
Certified Public Accountant	May, 1988

WORK EXPERIENCE:

PHILADELPHIA INDUSTRIAL DEVELOPMENT CORP (PIDC) (2006 – PRESENT)
VICE PRESIDENT – FINANCIAL REPORTING AND ADMINSTRATIVE SERVICES

Manage the preparation of annual financial statements for three independent annual audits for PIDC and related companies. Act as liaison between the auditors and all company management and staff. Create and implement policies and procedures to ensure proper operational efficiencies and internal controls. Complete the 990 and other required tax filings. Oversee administrative services including procurement of materials and supplies, leases and document management.

REDEVELOPMENT AUTHORITY OF THE CITY OF PHILADELPHIA (RDA) (1993 - 2006)
DIRECTOR OF FINANCE AND ADMINSTRATIVE SERVICES

Managed all financial operations of the RDA. Finance included the following departments: Accounting, Audit, Budget, Treasury, Contract Administration and Administrative Services. Specific duties included preparing financial statements, including the annual independent audit reports that became part of the City of Philadelphia's Comprehensive Annual Financial Report, preparing and administering the RDA's annual program and operating budgets; acting as liaison between the independent auditors, RDA management, the RDA's oversight agency and the City of Philadelphia, and resolving all audit findings. Other duties included serving as Chairperson of the RDA's Housing Review Committee that evaluated all housing and construction projects for financial and programmatic viability. Responsibilities required the application of accounting and industry standards: GAAP, FASB, GASB, OMB Circulars, Code of Federal Regulations (CFRs) and the City's Subrecipient Audit Guide.

MAJOR ACCOMPLISHMENTS: Redesigned the accounting system to meet all GAAP and Federal, State and City requirements and management needs. Completed a GAAP Conversion of the RDA's accounting operations to meet accounting and industry standards. Established the proper internal controls throughout the RDA that eliminated audit findings. Established standard operating procedures for Finance and Administrative Services which created efficiencies and significantly reduced the general ledger closing cycle, the invoice payment cycle and improved purchasing operations and inventory control. Established procedures to improve cash management and maximize investment earnings by restructuring and centralizing cash and investment operations and establishing a zero balance account for payroll. Created the Budget Department to standardize and complete a timely annual budget. Created the Internal Audit Department to complete the annual independent audit and procedural reviews timely and according to the required federal, state, city and management standards.

PHILADELPHIA GAS WORKS (1990 - 1993)
ACCOUNTING SUPERVISOR

Supervised the preparation of monthly and annual financial statements and related footnotes submitted to the Chief Financial Officer and Board of Directors. Reviewed account analysis, monthly departmental cost reports and proforma financial statements for new bond issues and refinancings. Was the liaison between the independent auditors and company management for independent audit activities. Created many efficiencies to reduce the general ledger closing cycle and provide monthly financial statements within eight days after month end submitted to the CFO. Created a financial environment that eliminated all audit findings in the accounting department during my tenure.

MEDICAL COLLEGE HOSPITALS (1988 - 1990) (FORMERLY ALLEGHENY & TENET)
ACCOUNTING SUPERVISOR

Supervised the monthly closing process and the preparation of monthly financial statements for six hospital and college entities submitted to the Board of Directors. Completed monthly account and budget variance analysis.

FIRST PENNSYLVANIA BANK (1986 - 1988)
SENIOR AUDITOR

Conducted financial and operational audits in the United States & Virgin Islands. In-Charge auditor on several audits which required developing audit programs for newly established operations, supervising lower level staff and providing performance evaluations. Completed all audits during my tenure twenty two (22%) percent under budget (hours). Was Assistant Manager on two Virgin Island audits which included planning audits.

COOPERS & LYBRAND CERTIFIED PUBLIC ACCOUNTANTS (1984 - 1986)
SENIOR AUDITOR

Completed accounting and audit work in various industries including: Banking and Mutual Funds, Healthcare, Colleges and Universities, other Not-for-Profits and manufacturing. In-Charge accountant over several audits which required overseeing all audit activities and financial statement preparation and following company audit and administrative requirements.

AFFILIATIONS:

American Institute of Certified Public Accountants (AICPA)
Pennsylvania Institute of Certified Public Accountants (PICPA)
Financial Advisor to the Joint Board - Resurrection Community Church
Former Board Member-Chairperson, Finance Committee - Germantown YMCA
Former Vice-Chairperson, Trustee Board - Holy Cross Church

REFERENCES WILL BE FURNISHED UPON REQUEST

SHORE, AVRACH AND COMPANY, CPA, Philadelphia, PA
Staff Accountant

1990 - 1991

EDUCATION

DREXEL UNIVERSITY, PHILADELPHIA, PA
Master of Business Administration, December 1997
Finance concentration

TEMPLE UNIVERSITY, Philadelphia, PA
Bachelor of Business Administration, Accounting, May 1990
Order of Omega Honor Society (1989)

CIVIC ACTIVITIES

CENTER CITY RESIDENTS' ASSOCIATION, Executive Board Member and Assistant Treasurer 2007 - present

AMERICAN JEWISH COMMITTEE, Philadelphia Chapter, Executive Board Member 2003 – 2008

DAVID L. EVANS
Pennsylvania Housing Finance Agency
211 North Front Street, Harrisburg, PA 17101
(717) 780-3928, devans@phfa.org

EXPERIENCE:

07/80 – Present **PENNSYLVANIA HOUSING FINANCE AGENCY**
Harrisburg, Pennsylvania

09/89 – Present Position: Assistant Executive Director of Multifamily Housing

The Assistant Executive Director is the head of all multifamily functions of the Agency. This position has responsibility over the entire multifamily process, from the underwriting of a multifamily loan application, to the allocation of low income housing tax credits, through the construction of the project, to the monitoring of the management and maintenance of a development. Along with supervising a staff of ninety-five, responsibilities include presentations to the Board of the Agency; coordinating activities with other agencies of the Commonwealth; developing policies for the multifamily functions; participating in numerous speaking engagements; having familiarity with the various programs that are available; and sitting on and/or chairing various committees on multifamily housing.

01/89 – 09/89 Position: Director of Development

The Director of Development is responsible for the development process of the Agency's multifamily financing programs. The Director also has immediate supervision over the low income housing tax credit program. Responsibilities include the supervision of all multifamily underwriting activities; researching, developing, and implementing new multifamily housing programs; and promoting to outside participants the lending programs available from the Agency.

02/87 – 01/89 Position: Deputy Director of Housing Management

Promoted from the Manager of Auditing position, the Deputy Director of Housing Management assisted the Director of Housing Management in the supervision of the Housing Management Division. Primary responsibilities included the supervision of a staff of financial analysts; monitoring the financial aspects of all multifamily developments financed by the Agency; assisting with the formulation of Housing Management Division policies and procedures on new multifamily programs; and monitoring the use of subsidies and fees received from the Department of Housing and Urban Development.

07/80 – 02/87 Position: Manager of Auditing

As the head of the audit function, responsibilities included the supervision and the review of the financial audits of housing developments. It also included the maintaining of reporting systems to be followed by the operating developments, including the composition of audit and accounting manuals.

06/77 – 07/80 **PEAT, MARWICK, MITCHELL AND CO.**
Harrisburg, Pennsylvania

Position: Senior Auditor

Responsibilities included the administration of the audit field work for assigned clients; the supervision of audit assistants in conducting annual audits; the review of internal controls; and the preparation of financial statements in accordance with generally accepted accounting principles. While principal audit experience was in the manufacturing industry, a primary client was the Pennsylvania Housing Finance Agency.

EDUCATION:

09/73 – 05/77 **SUSQUEHANNA UNIVERSITY**
Selinsgrove, Pennsylvania
BS Degree in Accounting, graduated cum laude

PERSONAL: **Certification:** Certified Public Accountant since September 1979

LAURIE ACTMAN
319 Bala Avenue, Bala Cynwyd, PA 19004
215-790-3794/610-664-0633
lactman@selectgreaterphila.com

Experience

- June 2008 – Present **CITY OF PHILADELPHIA**
Executive on Loan and Consultant, Mayor's Office
Major Activities and Accomplishments
- Helped conceive and launch the City of Philadelphia's new Office of Sustainability and *Greenworks Philadelphia*, the City's sustainability framework
 - Helped conceive and launch the Metropolitan Caucus, a Mayoral led regional engagement effort to pursue a common policy and political agenda with Philadelphia's four adjacent Pennsylvania counties and their elected officials
 - Now serving as Director of the Metropolitan Caucus
- April 2005- February 2009 **GREATER PHILADELPHIA CHAMBER OF COMMERCE/SELECT GREATER PHILADELPHIA**
Chief Policy Development Officer
Promoted to lead the department responsible for initiating and leading policy and program initiatives that improve the region's ability to attract businesses and jobs
Major Activities:
- Pursuing policy initiatives that improve the region's transportation and transit infrastructure; increase the amount of venture capital and technology transfer; and improve the quality of the region's workforce
 - Working with Board of 50 CEOs to determine priorities and implementation strategy
 - Advocating with elected officials at the federal, state and local levels in pursuit of policy goals
 - Convening multiple stakeholders and creating partnerships with organizations in Pennsylvania, New Jersey and Delaware
- August 2004- April 2005 **Director, Regional Growth Strategies**
Responsible for initiating and leading policy initiatives that improve the region's ability to attract businesses and jobs
- January 2003- July 2004 **CENTRAL PHILADELPHIA DEVELOPMENT CORPORATION, Philadelphia, PA**
Manager, Transportation & Planning Initiatives
Managed planning and development projects as well as the activities of the Central Philadelphia Transportation Management Agency
Major Activities included working closely with city agencies, the business community and public and private stakeholders to initiate legislation and address issues that impact transportation and development in Center City
- November 2000- December 2002 **GREATER PHILADELPHIA FIRST, Philadelphia, PA**
Senior Project Manager and Policy Analyst
Responsible for initiating and managing GPF's initiatives in economic development, transportation, urban revitalization, parks, greenspace and arts and culture
Major Activities and Accomplishments:
- Worked with Board of 50 CEOs and gave formal presentations to determine strategic priorities for promoting economic development opportunities
 - Lead a coalition of regional business and economic development leaders in a campaign to support development of the a major regional transit project; produced a campaign plan and materials explaining the many economic, environmental, social and transportation benefits of the project while identifying potential stakeholders in the project's development
 - Convened meetings with transportation finance and development experts, elected officials and business leaders to determine the best strategy for securing public and private financial support for the project
 - Created a state-wide coalition of infrastructure projects under development in Pennsylvania to advocate for increased state support of new commuter rail projects
 - Lobbied elected officials and policymakers at the local, state and national levels to educate them about the benefits and hurdles for the project's development
 - Researched, wrote and designed marketing brochure and white paper analyzing MetroRail's benefits for Greater Philadelphia
 - Developed and secured a \$100,000 grant from the PA Department of Community and Economic Development in partnership with DVRPC to develop a Quality of Place marketing strategy
- August 2000 - October 2000 **NATIONAL COMMUNITY CAPITAL ASSOCIATION, Philadelphia, PA**
Associate, Financial Services
- Monitored portfolio of loans, provide direct technical assistance as appropriate to Community Development Banks
 - Prepared written loan reviews including financial analyses and present screened applications to the loan committee

- Followed up with applicants, conduct site visits, secure whatever other data necessary to perform sound loan review
- Worked with Financial Services team to identify and develop new markets for NCCA and expand lending opportunities in accordance with the organization's strategic plan
- Provided assistance as necessary to help potential borrowers successfully qualify for NCCA financing
- Developed funding guidelines for equity grants to be used for childcare facilities financing program

January 1999 -
May 2000

THE CENTER FOR COMMUNITY CAPITALISM, Professor Michael P. Stegman, Director, Chapel Hill Research Associate

- Conducted research and analysis to provide empirical support and policy guidance on revising national housing policy during the 2000 Presidential election to ensure the availability of affordable housing for working families
- Evaluated a new national secondary mortgage market demonstration program developed by national banks for the Ford Foundation to analyze whether mortgage lending was expanded to low-income, low-wealth or minority households

June 1999 -
August 1999

**LOCAL INITIATIVES SUPPORT CORPORATION (LISC), New York City
Urban Reinvestment Intern, National Main Street Initiative**

- Developed strategies to revitalize six inner-city commercial districts located across the U.S. incorporating public and private sector investment options
- Conducted research and wrote a national newsletter that was distributed to CDC managers to guide commercial district revitalization strategies; highlighted "best practices" through case studies
- Researched effective marketing techniques for neighborhood business districts and their coordinating programs

October 1996 -
July 1998

**RAILS-TO-TRAILS CONSERVANCY, Washington, D.C.
Policy & Planning Analyst**

- Monitored and analyzed federal legislative and regulatory issues affecting rail-trails and other non-motorized transportation facilities; used results to lobby Congress, federal agencies and state legislatures on behalf of reauthorization of the intermodal provisions of ISTEA
- Organized grassroots advocacy events and meetings with elected officials across the country to win votes for reauthorization of the Transportation Enhancements Program
- Provided strategy and policy guidance for local rail-trail groups trying to develop and protect trail friendly programs
- Initiated and wrote a monthly policy newsletter to inform partners across the country about the most recent policy updates and challenges
- Coordinated ISTEA reauthorization coalitions with national and local partners
- Worked with PR consultants to determine media strategy and respond to press inquiries

January 1996 -
September 1996

Senior Development Associate

- Developed and managed foundation and corporate fundraising and cause-related marketing programs for national and six field offices; conceptualized and drafted all foundation, corporate and cause-related marketing proposals; and developed and maintained relationships with key foundation and corporate funders and prospects
- Raised \$100,000 from corporate and foundation funders

January 1994 -
December 1995

**THE BROOKINGS INSTITUTION, Washington, D.C.
Foundation Relations Associate, External Affairs**

Analyzed Brookings research proposals, worked with foundation program officers to match Brookings research with foundation priorities, initiated and conducted research on foundation funders for Brookings research and special projects

September 1992 - **ASSOCIATION OF TRIAL LAWYERS OF AMERICA POLITICAL ACTION COMMITTEE, Wash, D.C.**
December 1993 **Fund Development Assistant**

**Current Board Memberships
Other Memberships**

The Greenspace Alliance, Jewish Homes for Adult Independence (J'Chai)
Urban Land Institute, Central Philadelphia Development Corporation, Women in Transportation

**Volunteer
Experience
1998 - 2000**

CARRBORO DOWNTOWN DEVELOPMENT COMMISSION, Elected Member

- Coordinated with other Commission members to support the future development of Carrboro's downtown business district in order to preserve its historic, community and pedestrian character
- Analyzed and recommended small business applicants for funding from the Carrboro Revolving Loan Fund

1994 - 1998

The Environmentors Project, Metropolitan Branch Trail Coalition, D.C. Farmers' Market

Education

1998 - May 2000 **UNIVERSITY OF NORTH CAROLINA, CHAPEL HILL, Department of City and Regional Planning**
Master of Regional Planning, received May 2000

Specialization: Real Estate and Community Economic Development

Elected by students as Co-President, Planners Forum; Recipient of Merit Based Assistantship, full tuition award

Thesis Topic: The Development Process and Financing of Inner-City Supermarkets

Real Estate Workshop Topic: Feasibility of Locating a Web-Grocer in the Raleigh-Durham MSA

1988 - 1992

WASHINGTON UNIVERSITY, St. Louis, MO, Bachelor of Arts, Political Science, May 1992

Washington, D.C. summer internship program coordinator; Contributing editor, *Student Life* Newspaper; Staff Accountant,

Washington University Campus Bookstore; Women's Club Lacrosse team

ELIZABETH HILL ROBINSON

566 Jamestown Street
Philadelphia, PA 19128
215/482-3943
215/988-0929 ext 233 – office

Born: October 10, 1949
Married, two children

PROFESSIONAL EXPERIENCE

Executive Director, Energy Coordinating Agency of Philadelphia 11/84 – present
Direct a public private partnership responsible for addressing the energy needs of low and moderate income Philadelphians. ECA administers and coordinates almost all the conservation, education and bill payment assistance programs in Philadelphia, conducts research and planning in order to maximize resources; and advocates for clean, affordable energy for all. ECA provides energy services to more than 100,000 households a year. Many services are provided through its network of Neighborhood Energy Centers, each of which serves as a “one-stop-shop” for low income energy needs. ECA also provides leadership to statewide clean energy policy efforts, and works closely with government and utilities to increase energy efficiency and reduce greenhouse gas emissions in buildings. Staff size: 120; Annual budget: \$13.4 million.

Director, GRASP (Grass Roots Alliance for a Solar Pennsylvania) 5/84 – 11/84
Directed a non-profit organization working with community groups toward energy self-reliance. GRASP is a research, evaluation and training organization, specializing in energy efficiency in existing residential structures.

Energy Coordinator, Philadelphia Council of Neighborhood Organizations 4/83 – 5/84
Promoted conservation in neighborhoods across the city. Developed grassroots network and participated in a state-wide effort to resolve the home heating crisis for low income households.

Executive Director, People's Emergency Center 8/78 – 5/83
Administered an emergency shelter for families, couples, single women, and juveniles. Responsible for all fundraising, proposal writing, program development, policy formulation, fiscal policy and budget management. Supervised a staff of 8 paid and 80 volunteers; trained and recruited volunteers. During my tenure as Director, the Center's service capacity, size of staff and budget increased threefold.

Coordinator, Kensington Youth Coalition 11/75 – 11/77
Organized and administered a grassroots coalition of seven black, white and Hispanic community organizations to serve local youth.

Teacher, Pennsylvania Advancement School 9/73 – 6/75
Taught grades 5 through 9 social science, arts and crafts, math, reading, science and Spanish.

Program Developer, United Planning Organization, Washington, DC 4/71 – 7/73
Provided technical assistance to community action agencies: program development, proposal writing, fundraising, and research.

Volunteer, American Friends Service Committee, San Isidro, Puebla, MX 6/70 – 12/70
Conducted educational programs with the townspeople.

EDUCATION

Goucher College, Towson, Maryland, B.A. (cum laude) International Relations, 9/67 – 12/70
Wayne State University, Detroit Michigan, M.F.A. Sculpture, 3/78
Philadelphia College of Art and Maryland Institute College of Art, Baltimore, MD
Course work, 1971 – 1977
S.A.M.E.D., Management, Administration, Financial Planning, Personnel and related
management issues, 1981 – 1982

CURRENT PROFESSIONAL ACTIVITIES AND MEMBERSHIPS

Board of Directors, Green Power, National Board
President, Board of Directors, Sustainable Development Fund
Board of Directors, Regional Housing Legal Services
Member, Policy Advisory Council to PA Department of Community Affairs for the
Weatherization Assistance Program
Member, Pa. Public Utility Commission, Consumer Advisory Committee
Member, Advisory Committee to the Department of Public Welfare for the Low Income Home
Energy Assistance Program

HONORS

Touchstone Award, Society of Women Environmental Professionals 2007
Inclusion in Philadelphia Leaders 1989 – 1993
Jefferson Award of Outstanding Community Service, March 1981
Phi Beta Kappa, Goucher College
Who's Who in American Colleges and Universities, 1970

LANGUAGES AND AVOCATIONS

Fluent in both Spanish and French
Hobbies include bicycling, drawing, swimming and gardening

EXPERIENCE**DELAWARE VALLEY REGIONAL PLANNING COMMISSION (DVRPC)***Philadelphia, Pennsylvania***Manager, Office of Economic Analysis and Coordination****2007-2009****Manager, Office of Energy and Climate Change Initiatives****2009-present**

DVRPC is the federally designated metropolitan planning organization for the Greater Philadelphia region, and works to foster regional cooperation in a nine-county, two-state area. Serve as point of contact for DVRPC initiatives to coordinate regional economic development. Established and DVRPC's Office of Energy and Climate Change Initiatives. Managed the creation and publication of DVRPC's *Regional Greenhouse Gas Emissions Inventory*, which allocated emissions to the municipality level. Serve on PECO Energy's Act 129 Stakeholder Group. Coordinate with municipal, county, state, federal, business, and non-profit organizations in the region and nationally on climate change and energy issues. Represent DVRPC on greenhouse gas/climate change task forces in Montgomery County, Chester County and Haverford Township (Delaware County).

PENNSYLVANIA ECONOMY LEAGUE, SOUTHEASTERN PA*Philadelphia, Pennsylvania***Senior Project Manager****2001-2007**

For Pennsylvania's premier public policy research organization, design, manage, and carry out research on a wide range of issues of importance to Greater Philadelphia's economy. Selected projects include:

- Designed, organized, and recruited participants and speakers for the Greater Philadelphia Leadership Exchange (LEx), which brought over 75 regional leaders from Philadelphia to Chicago for a 3-day benchmarking visit focusing on regional cooperation in fall 2005.
- Led research for Philadelphia Industrial Development Corporation (PIDC) efforts to retain Department of Defense facilities during the 2005 Base Realignment and Closure (BRAC) round. Quantified the economic importance to the region's economy of Philadelphia's DoD facilities. Performed a detailed industry-level analysis of the \$3.9 billion in annual DoD contracts performed in the region, establishing the region as a locus of high-value DoD procurement.
- Managed, developed data for, and operated two Ernst & Young tax models of Greater Philadelphia to compare tax burdens on individual firms in defined industries and representative households.
- Developed Innovation Philadelphia's award-winning *Innovation Scorecard* comparing Philadelphia with peer metropolitan regions on support for knowledge generation and business creation.
- For University City District, designed and carried out research on University City's desirability as a place to locate a business. Involved survey/interviews of real estate and technology companies.

TELLUS INSTITUTE*Boston, Massachusetts***Associate Scientist, Business and Sustainability Group****1997-2001**

Focused on voluntary corporate reporting, the relationship between corporate environmental and social performance and financial performance, pollution prevention, and environmental accounting.

Project Manager, Global Reporting Initiative (GRI) Interim Secretariat**1998-2001**

GRI's mission is to promote international harmonization in the reporting of relevant and credible corporate economic, environmental, and social performance information to enhance responsible decision-making.

Managed the development, testing, and production of the *Sustainability Reporting Guidelines*, the core product of the GRI, a foundation-funded venture of UNEP (United Nations Environment Programme) and CERES (the Coalition for Environmentally Responsible Economies). Managed communications with Steering Committee members, developed agendas and briefing documents for over a dozen working meetings in Europe, North America, and Asia. Solicited, compiled, and resolved conflicts on draft text comments from close to 100 participants. Presented to investors, businesses, governments, environmental and social justice advocates, and others. Briefed and advised the Secretariat's Executive Director and the Chair of the GRI Steering Committee.

Research Associate → Associate Scientist, Solid Waste Group**1995-1997**

Completed local solid waste planning projects in the U.S. and Egypt. Trained local solid waste managers in use of WastePlan, Tellus' integrated solid waste management modeling software. Analyzed local recycling programs and source-reduction projects. Developed REDUCEIT, source-reduction modeling software for US EPA.

NEW ENGLAND ELECTRIC SYSTEMS

Consultant on Effectiveness of Energy Efficiency Programs

Southborough, Massachusetts

1994–1995

INDUSTRIAL ECONOMICS, INC.

Associate

Cambridge, Massachusetts

1991–1994

Conducted cost-benefit analyses for environmental regulations, including the Clean Air Act, air emissions regulations for the incineration of hazardous waste in cement kilns, and regulations for spill remediation at hazardous waste facilities. Developed geographic analysis of combined sewer overflows used to brief Congress. Primary client was the Office of Policy Planning and Evaluation of US EPA.

INFORM, INC.

Solid Waste Research Consultant

New York, New York

1990–1991

Analyzed the potential contribution of two-sided photocopying to solid waste source reduction. Research involved site visits, interviews with professionals, and review of literature. Research published as an INFORM Special Report. Presented results at the 1991 World Recycling Conference and Exposition.

U.S. AGENCY FOR INTERNATIONAL DEVELOPMENT (USAID)

Assistant Evaluation Officer

Cairo, Egypt

1989–1990

Reviewed and summarized project assessments for USAID, Cairo. Directed project review and redesign process. Conducted on-site project evaluations throughout Egypt. Designed and developed a computer-based system to track progress in addressing evaluation recommendations.

CITY OF NEW YORK RECYCLING PROGRAM

Project Analyst

New York, New York

1989

Led research effort for developing policies to increase the amount of office paper recycled in New York City. Investigated economic and technical constraints, institutional resistance, legal issues, and approaches used in other cities. Developed original research comparing the environmental and energy costs of paper and plastic shopping bags. Analysis encompassed manufacturing, distribution and disposal.

EDUCATION

PRINCETON UNIVERSITY—WOODROW WILSON SCHOOL

Masters Degree in Public Affairs and Urban and Regional Planning

Princeton, New Jersey

1991

DARTMOUTH COLLEGE

B.A *cum laude* in Engineering Sciences modified with Anthropology

Hanover, New Hampshire

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Katherine Lorene Gajewski

WORK EXPERIENCES

Director, Mayor's Office of Sustainability, City of Philadelphia **Current**

Responsible for overseeing policy development, coordinating programs, and implementing *Greenworks Philadelphia*, the City's comprehensive and ambitious sustainability plan. Overseeing the City of Philadelphia's EECBG Formula grant-funded program.

Special Assistant to the Chief of Staff, Mayor's Office, City of Philadelphia **Jan. 2008- July 2009**

Managed a number of major citywide projects and led a number of the Nutter Administration's community outreach efforts, playing a major role in the public engagement during the budget process. Served as an advisor to Mayor Nutter, Chief of Staff Clay Armbrister, and senior members of the Nutter Administration on a wide range of policy issues, with a particular focus on sustainability.

Transition Team of Mayor-Elect Nutter **Nov. 2007 – Jan. 2008**

Coordinated transition teams and searches for senior personnel.

Outreach Coordinator, Nutter for Mayor **March 2007-Nov. 2007**

Developed outreach plans for the mayoral campaign, managed campaign events and served as a point-of-contact to community organizations and neighborhood groups and oversaw planning, zoning and sustainability policy teams.

Consultant, Robert Wood Johnson Foundation – Philadelphia, PA **Nov. 2006 – March 2007**

Liaison between RWJF and the Department of Public Health. Developed comprehensive plan to implement Philadelphia's smoke-free workplace law. Oversee all aspects of implementation, including: earned and paid media, citywide business outreach, coalition building with private and public partners, website development, ongoing public education and data evaluation.

Aide, Councilman Michael Nutter/4th Council District – Philadelphia, PA **April-Nov. 2006**

Assisted with legislative functions, constituent services, district-based projects and community affairs. Worked on ten redevelopment projects in West and North Philadelphia. Developed close working relationships with Council members and staff, city employees and community members.

Campaign Coordinator, Breathe Free Philadelphia Alliance – Philadelphia, PA **2004-2006**

Led the successful two-year campaign to pass controversial smoke-free workplace legislation in City Council. Oversaw all activities of the Alliance and worked closely with partnering organizations, diverse community groups, faith leaders, business owners and employees, elected officials and staff. Developed all campaign strategies and communications materials. Directed extensive grassroots organizing, media outreach, volunteer recruitment and involvement, district-based constituent activities and online advocacy. Participated in direct and indirect lobbying efforts and legislative negotiations. (*Contractor to the Campaign for Tobacco-Free Kids*)

Field Organizer, MoveOn PAC – Philadelphia, PA **Fall 2004**

Recruited, trained, and managed volunteer leaders and teams in 24 divisions in NE Philadelphia as part of *Leave No Voter Behind* – a neighbor-to-neighbor voter outreach program focused on increasing turnout of infrequent voters.

Outreach Intern, Northern Forest Alliance – Montpelier, VT

Summer 2004

Assisted staff, coalition partners, and NFA Board on projects aimed at securing broad-based support for legislative efforts to bring funding to the Northern Forest region. Created outreach materials and conducted site visits to Maine businesses participating in the Businesses for the Northern Forest program.

Development Coordinator, Cascade Land Conservancy – Seattle, WA

2002 –2003

Planned and executed all aspects of the major annual public relations and fundraising event. Coordinated corporate sponsors, elected officials, and board members.

EDUCATION

Wesleyan University - Middletown, CT

May 2002

- Bachelor of Arts: Anthropology major
- Honors Thesis: "Conservation and Community: The Cultural Landscape of Norwich, Vermont"

BIOGRAPHY

**DEBORAH McCOLLOCH
DIRECTOR
OFFICE OF HOUSING AND COMMUNITY DEVELOPMENT
CITY OF PHILADELPHIA**

Deborah McColloch was appointed Director of the City of Philadelphia's Office of Housing and Community Development (OHCD), the City's housing policy agency, in July 2008 by Mayor Michael A. Nutter. In this capacity, Ms. McColloch administers an annual budget of \$150 million, funded primarily through the federal Community Development Block Grant (CDBG) and HOME programs, to support housing production and conservation, housing services and economic development in Philadelphia neighborhoods.

Ms. McColloch has spent her entire professional career working for the City's housing agencies. From 2001 to 2007, she held the positions of OHCD Director and OHCD First Deputy for Strategic Planning.

As OHCD Deputy Director for Policy from 1994 to 2001, she was responsible for organizing the City's annual housing budget, preparing federal and state funding applications and developing policy and program initiatives. Ms. McColloch was OHCD contract administrator for seven years (1987 - 94), overseeing more than 100 contracts with subrecipient agencies. She joined OHCD in 1979 as a neighborhood program coordinator, transferred to the Philadelphia Housing Development Corporation in 1983 in the nonprofit housing field and returned to OHCD in 1987.

Ms. McColloch chairs the Philadelphia Housing Trust Fund Oversight Board. She serves on the Board of Directors of PennPraxis and the Housing Assistance Fund Inc., as well as the Board of Trustees of Ohio Wesleyan University. She has taught seminars on housing policy to graduate students in the City and Regional Planning Department of the University of Pennsylvania. She earned a Master's Degree in City Planning from Penn and a Bachelor of Arts degree from Ohio Wesleyan University.

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scott.wilds@phila.gov

Overview:

More than twenty years of progressively-responsible positions with the City of Philadelphia's Office of Housing and Community Development (OHCD). Highly knowledgeable about affordable housing and community development programs and policies, HUD regulations and requirements, affordable housing financing, funding and budgets.

Experience:

Deputy Director, 2001–

City of Philadelphia, Office of Housing and Community Development

- Directs OHCD's Policy and Planning unit, which oversees the preparation of the City's annual *Consolidated Plan* and other funding applications for approximately \$100 million in federal and state funding for housing and community development programs. The unit (with six members currently) develops City policy related to affordable housing and community development. It prepares annual reports for the U. S. Department of Housing and Urban Development (HUD) and Housing Trust Fund programs and quarterly reports to City Council, tracks affordable housing production and may prepare affordable housing plans for selected neighborhoods.
- Responsible for the production of the *Consolidated Plan*, the HUD-mandated annual application for Community Development Block Grant (CDBG), HOME Investment Partnership, Housing Opportunities for Persons with AIDS (HOPWA) and Emergency Shelter Grant funds.
- Prepares the City's annual application and budget to the Pennsylvania Department of Community and Economic Development (DCED) for Housing and Redevelopment Assistance funds.
- Issues Requests for Proposals for affordable housing development and other housing programs, manages the review process and makes recommendations for project selection. Initiatives budget revisions and manages OHCD budget to fund selected projects.

- Reviews City, state and federal legislation and regulations related to affordable housing and community development. Prepares testimony for Philadelphia City Council hearings.
- Maintains relationships with the regional HUD office and DCED.
- Reviews programs for compliance with federal and state regulations. Responds to HUD monitoring reviews.
- Serves as member of the Philadelphia Historical Commission as Director of Housing's designee. Serves as City representative on the Philadelphia Local Initiative Support Corp. (LISC) Credit Committee.
- As Deputy Director, holds approval authority for OHCD draws of over \$500,000 in the City's FAMIS accounting system and contract signature authority.

Assistant Director for Housing, 1994 – 2001

City of Philadelphia, Office of Housing and Community Development.

- Developed policy for and monitored performance of housing production and preservation activities implemented by community development corporations, private developers and the Philadelphia Housing Development Corporation (PHDC).
- In conjunction with Redevelopment Authority staff and others, planned complex development ventures and provided OHCD support to help development projects advance to completion. Participated in project design team meetings for large housing development projects such as the Poplar Nehemiah and Cecil B. Moore Homeownership Zone ventures.
- Reviewed development proposals and pro formas for housing ventures for compliance with HUD regulations for the CDBG and HOME programs.
- Coordinated housing development with staff from other agencies, including the Philadelphia City Planning Commission, Pennsylvania Housing Finance Agency, Philadelphia Housing Authority, and Philadelphia City Council.
- Served as member of the Philadelphia Historical Commission and Vacant Property Review Committee as Director of Housing's designee.
- Collaborated with OHCD public information and policy and planning department staffs to produce the annual OHCD *Consolidated Plan*.
- Coordinated Philadelphia region's Housing Opportunities for Persons with AIDS (HOPWA) program, with a \$3.2 million budget. Coordinated planning for the Homestart substantial rehabilitation program implemented by PHDC.

Executive Assistant to the Director of Housing, 1987 - 1994.
City of Philadelphia, Office of Housing and Community Development.

- Participated in full range of policy and budget discussions, including reviewing responses to requests for proposals for housing counseling and housing development.
- Wrote grant applications to HUD and to the Pennsylvania Department of Community Affairs.
- Acted as ombudsman as assigned by Director of Housing, including City liaison to residents of Osage Avenue (MOVE tragedy) for warranty repairs. Special assignments included supervising public information department in absence of unit head and working with the Philadelphia Housing Development Corp. to acquire residential properties for the homeless.
- Served as member of the Philadelphia Historical Commission as Director of Housing's designee.
- Answered correspondence and queries from elected officials and the general public.
- Collaborated with public information and policy and planning departments to produce OHCD annual plan.

Legislative Assistant to Councilman Edward A. Schwartz, 1984 - 1987.
City of Philadelphia, City Council.

- Tracked and researched legislation and issues.
- Represented Councilman at meetings of City agencies and other groups.
- Wrote press releases and answered press inquiries.
- Monitored transportation issues, especially SEPTA budget and routes. Worked with community residents to promote a package of route improvements for Northeast Philadelphia.
- Conducted meetings with advocacy groups and City agencies to develop and pass a comprehensive animal control ordinance.
- Performed constituent services and answered correspondence.

**Associate editor, Papers of William Penn project, 1979 - 1983.
Historical Society of Pennsylvania, Philadelphia.**

- Researched, edited and wrote for a select scholarly edition of Penn's writings published by the University of Pennsylvania Press, Richard Dunn and Mary Maples Dunn, General Editors.
- Developed and implemented computerized coding and typesetting system. Primary liaison with printer and publisher on production schedule and details.

Education:

- Ph.D. program, University of Pennsylvania. Completed all requirements except dissertation for degree in American Civilization. ("A.B.D.")
- A.M., University of Pennsylvania, American Civilization, 1974.
- B.A., Southwestern At Memphis (now Rhodes College), Memphis, Tennessee, anthropology, with distinction and honors, 1973.

Other:

- Temple University, Real Estate Institute, courses on real estate fundamentals and practices. Passed state license examination for real estate salesperson.
- City of Philadelphia, Personnel Department, management training courses, including Performance Excellence, EEO, Sexual Harassment, Labor Relations.
- Proficient in Microsoft WORD, Excel, PowerPoint.
- Active in community organizations. President, Philadelphia FIGHT. Member of the Vestry and Treasurer, St. Mary's Episcopal Church, Hamilton Village, Philadelphia. Mayoral appointee, City Combined Campaign Advisory Committee. Former board member, Bread and Roses Community Fund. Former board member and officer, Spruce Hill Community Association, 1980-1987. Democratic committeeperson, 46th ward, 1978-1987. Member, Pennsylvania State Democratic Committee, 1980-1982.

Andrew M. Rachlin

919 E. Passyunk Ave., Philadelphia, PA 19147 ♦ (609) 651-0755 ♦ andy.rachlin@gmail.com

EXPERIENCE

Deputy Chief of Staff, Office of the Deputy Mayor for Planning and Economic Development September 2008 – Present
City of Philadelphia, Philadelphia PA

- Created and oversaw public/private task force charged with coordinating more than \$50 million in federal, state, and local funds for energy efficiency retrofits for low income households
- Led interdepartmental effort to identify and obtain economic development opportunities in the federal stimulus package, including the creation of a \$10 million leveraged gap financing product for real estate investments
- Managed communications for the Deputy Mayor's office, setting strategy, overseeing press conferences and materials, and developing media relationships

Chief of Staff, Office of the Executive Director January 2007 – April 2008
Port Authority of New York and New Jersey, New York, NY

- Conceived and implemented programs to advance Executive Director's policy priorities, including \$35 million initiative to make Port Authority the world's first carbon-neutral transportation agency by 2010
- Advanced internal management initiatives, including establishment of a new planning and budgeting process for agency's \$30 billion capital program
- Oversaw executive staff of four, and multiple interdepartmental working groups of 20 or more

Policy Advisor for Public Safety May – July 2006
Newark In Transition, Newark, NJ

- Convened panel of nationally recognized experts to craft policy recommendations as part of transition team for incoming Newark Mayor Cory Booker
- Authored Public Safety Group Final Report used by Mayor Booker in establishing highly successful criminal justice policy, which has reduced violent crime in Newark by over 40% since 2006

Program Associate August 2005 – January 2007

Policy Research Institute for the Region at Princeton University, Princeton, NJ

- Served as consultant to local and state governments, including authoring reports on education policy and procurement strategy for NJ Governor Corzine's Commission on Government Efficiency and Reform
- Developed and managed PRI Press, the Institute's publishing arm, publishing 10 books in first year with concept-to-print times 50% shorter and costs 30% lower than comparable publications
- Designed and coordinated nearly one dozen research projects on issues ranging from human trafficking to election reform

EDUCATION

St. Andrews University, St. Andrews, Scotland, 2005

*MLitt. in International Security and Counterterrorism, *summa cum laude**

Princeton University, Princeton, NJ, 2004

*AB in Political Science, *Phi Beta Kappa, magna cum laude**

LANGUAGES

Conversational Portuguese, limited reading ability in French and Spanish.

JAMES J. GAMBINO

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Coopersburg, PA 18036

Mobile: (267) 679-6956
james@sep.benfranklin.org

Vice President of Technology Commercialization: Physical Sciences, Ben Franklin Technology Partners of Southeastern Pennsylvania (BFTP/SEP). 2008-Present

The Technology Commercialization Group creates pathways to commercialization for new companies, entrepreneurs and researchers, by connecting with regional universities, government and private partners. Jim is also responsible for developing and managing Ben Franklin's role in the Commonwealth's Alternative Energy Development Program under the Energy Investment Act.

Principal Partner, PolySolutions Advisors LLC, Coopersburg, PA 2005-2008

PolySolutions Advisors LLC is a consulting company providing business and technology support and entrepreneurial coaching to start ups and emerging technology businesses. Client companies span the nanotechnology, medical device, IT solution, consumer product and biomedical actives markets.

ELEMENTIS PLC, ELEMENTIS SPECIALTIES, INC. Hightstown, NJ 1998 –2005

Elementis, plc is a \$700 million specialty chemical company. Elementis Specialties Inc, markets specialty polymers, rheological additives, surface active agents, nanoparticles, and colorants worldwide to the coatings, oil field, graphic arts, cosmetics, lubricant, plastics, adhesives and consumer markets.

Vice President, CTO, Elementis Specialties, Inc. (2001 – 2005)

Responsible for all Research and Development, New Business Development, and Licensing, for this \$400 million, 16% operating margin business, reporting to the CEO.

- Created a new organizational model using external Licensing, contract Research, and an external Advisory Board, enabling internal Technology personnel to develop advanced products more quickly.
- Led a consortia comprised of Elementis Specialties, an electronic circuitry design and equipment company. Consortia received initial approval for UK government grant funding under the Micro and Nanotechnology (MNT) funding program.
- Pioneered the development of lamellar nanoclays as mechanical and fire retardant enhancers in plastic nanocomposites and nano zinc oxide as clear UV absorbers in plastics and cosmetics formulations.

Vice President, Marketing and Research & Development, RHEOX, Inc. (1998 to 2001)

RHEOX Inc. was a global specialty rheological additive company within the Elementis plc Group.

P&L responsibility for this \$145MM, company, reporting to the CEO, responsible for Marketing, New Business Development, R& D, Technical Service, Patent/Legal, and Advertising. Marketed the Company's specialty polymers, rheological, nano particulates, and surface active additives to architectural and industrial coatings, oil field, lubrication, graphic arts, cosmetics, plastics and other markets.

NL INDUSTRIES, RHEOX, Inc. 1992 - 1998

Vice President, Marketing, Specialties (1995 to 1998)

Business Director, Specialties (1991 to 1995)

P&L responsibility for \$75MM in revenue, 30% operating margin business, marketing high value specialty additives to a wide range of industrial and consumer markets.

- Instituted a flat Business Team structure, increased group revenue 45% over the 91/96 period, and improved profitability and market share. Managed a business strategy which made RHEOX the global major market shareholder of non- aqueous oil drilling mud rheological additives, positively impacting HTHP and directional drilling application range.
- Marketed the first organoclay rheological additive line for vegetable based greases which passed all roadbed biodegradability criteria, maintaining organoclay grease additive leadership. Introduced non animal derived cosmetic gellants, ultimately becoming the industry market leader.

ROHM AND HAAS COMPANY, Philadelphia, PA 1970 - 1991

Business Unit Manager, New Technology, Corporate Development (1988 to 1991)

Led the Company's New Technology Group. Assessed new technologies and developed new businesses, reporting to the Director, Corporate Development.

- Led a startup plastic additive compatibilizer business, commercializing a new plastic additive technology in 18 months using a parallel, critical path program. Delivered over \$1million in revenue before transferring the business to the Plastics Additives Business Unit.
- Managed the analysis of multiple new business opportunities, developing market entry strategies for specialty elastomer and electronic ceramic additive businesses.

Group Market Manager, Industrial Coatings, North America (1985-1988)

Vice President, Marketing, Member, Board of Directors, Polytribo, Inc.

Managed a \$150 million binder and specialty additives business serving the industrial coatings, marine & maintenance and graphic arts markets. Responsible for the Company's acrylic emulsions, and acrylic copolymer, epoxy, polyester based industrial binders, solution polymers dispersion resins, biocides and fungicides. Increased revenue by 12%, operating margins to 15%.

- Created the business strategy and led joint venture contract negotiations with Fuji Kura Kasei, a leading Japanese acrylic based reprographic toner resin producer. Founding Company Executive for the \$20 million joint venture. Doubled new product sales over the period.
- Formulated a market entry strategy and secured rights to a specialty powder coatings additive technology. Primid® hydroxyalkylamide curative became a multi million business.

Varied Management Positions (1970-1985)

Marketing, Market Development, Business Analysis, International Division, Operations, Technical Service.

Founded the Company's Specialty Additives Business Group, marketing associative thickeners, dispersants, opacifying agents, and biocides to the architectural, industrial coatings, graphic arts, and textile markets.

Education:

Bachelor of Science, Chemical Engineering, Polytechnic Institute of New York, 1970

Business Management, Executive Program, Wharton School, University of Pennsylvania, 1981

DAVID L. COHEN, AICP
(o) (215) 972-6700 ext. 3222
david.cohen@sep.benfranklin.org

PROFESSIONAL EXPERIENCE:

- 2009 **Ben Franklin Technology Partners – Southeastern PA, Philadelphia, PA**
Manager of Program Analysis and Development (PAD)
- Conduct economic research, develop metrics, manage databases and PAD unit staff members. Provide support for execution of new program initiatives, focused on sustainable energy and technology commercialization. Identify funding opportunities and develop proposals. Develop and maintain regional partnerships. Analyze policy and legislation. Develop and implement semantic web based regional energy asset map and other interactive analytical tools.
- 2006 - 2008 **North Philadelphia Health System, Philadelphia, PA.**
Director of Development
- Created a development office for a hospital system with 1,600 employees and an annual budget of \$120,000,000. Secured over \$1 million in grants from foundations, individuals and government. Conducted policy analysis and strategic planning. Developed community partnerships. Economic development.
- 2005 - 2006 **Girard Coalition, Inc., Philadelphia, PA.**
Executive Director
- Led public private partnership focused on economic revitalization and strategic cooperation with representation of dozens of organizations in a diverse environment. Facilitated completion and restart of operations of an historic trolley route; secured over \$3 million in funding for streetscape improvements; developed and implemented design guidelines; designed and implemented community improvement programs; designed and implemented web site; secured funding; developed and implemented multi-faceted budgets.
- 1999 – 2005 **City Avenue Special Services District, Philadelphia, PA**
Executive Director
- Created and directed the award winning nation's first multi-jurisdictional business improvement district, which brought together the public, private and non-profit sectors in an edge city to improve a mixed use area. Developed strategic plan, budget, boundaries and programming. Secured over \$3 million in grant funding and government grants. Wrote and secured passage of legislation. Created a public safety patrol, which led to significant decreases in crime. Created a bus system. Developed marketing program and web site. Developed and implemented accounting system and database. Worked with developers and community to foster new development, new physical improvements, and an improved image of the area.

1995 – 1999 **Greater Philadelphia Urban Affairs Coalition, Philadelphia, PA**
Co-Director of Partnership for Jobs and Housing

Developed and ran a welfare to work program that successfully placed people in meaningful jobs. Secured program funding. Secured job commitments from employers. Implemented and monitored contracts. Designed organization web site. Designed multi-faceted database for program evaluation. Hired and evaluated staff. Conducted client training. Performed public policy analysis.

1990 - 1995 **Central Philadelphia Development Corporation, Philadelphia, PA**
Director of Planning and Management

Public policy analysis and urban planning. Performed, organizational planning, economic analysis and design work for Avenue of the Arts, a multi-billion dollar economic development project. Conducted organizational planning work for the implementation of the Center City District. Performed transportation planning and analysis. Undertook zoning code creation and analysis research and testimony. Wrote feasibility report, plan design and implementation, legislation, and oversaw public approval for creation of South Street Headhouse District, a Business Improvement District. Installed and managed accounting system.

1987 – 1988 **American Foreign Service Association, Washington, D.C.**
Member Services Representative

Represented foreign service personnel from State Department, U.S. Agency for International Development in administrative and grievance hearings. Negotiated work rule regulation changes for 23,000 foreign service members. Researched policies. Wrote articles for Foreign Service Journal.

EDUCATION:

2003 **Saint Joseph's University**
Executive Master's of Business Administration (EMBA).

1993 **Leadership, Inc. Philadelphia, PA.**
Leadership Training.

1991 **University of Illinois**
Master's of Urban and Regional Planning.

1987 **Emerson College**
B.S. in Communications, Politics and Law.

Salvatore J. Pace, PhD
Ben Franklin Technology Partners of South East Pennsylvania
Technology Commercialization Mgr.
salvatore@sep.benfranklin.org

Industry Positions:

NanoSelect Inc. CTO 2004 to 2007

- Directed this nanotechnology start-up company with licensed technology from U. of Pennsylvania's pioneering work on carbon nanotubes.
- Developed Business Model for Water Utilities applications to win investment.
- Defined Technology program and built the organization at DE Technology Park.
- Responsible for new Intellectual Properties (patents applied as inventor).

Sensicore Inc. CTO and VP of R&D 2000-2003

- Founded company with licensed technology from the University of Michigan and built the program for sensor development.
- Generated new technology and Intellectual Property focused on defined product platform..
- Defined the Business Model for water monitoring Health & Safety Networks for municipalities that lead to the raising of \$12.1MM in VC investment.

IGEN International, Inc. R&D Director 1998-2000

- Developed the Point-of-Care Clinical Diagnostics Program based on Electrochemistry and Electro-chemiluminescence technology proprietary to IGEN.
- Created the organization and technical foundation for POC product development.

E.I. DuPont/Qualicon Inc. R&D Manager 1996-1998

- Managed the Advanced Technology Program (NIST), Tools for DNA Diagnostics, US Dept. of Commerce.
- Directed/lead the technical team re. Micro-PCR / Capillary Electrophoresis for Microbial Analysis (DNA diagnostics).

E.I. DuPont de Nemours & Co., Inc. Research Scientist 1980-1996

- Commercialized Chemical Sensors based on Hybrid Circuit technology for the Dimension MultiPLY® Clinical Analyzer System (\$120MM per yr. Business).
- Pioneered DNA sequencing on a Silicon chip (I hold the pre-eminent Si Lab-on-Chip patent). Established basics for Electro-osmotic flow and high Resolution Electrophoresis separations in micro-channels.
- Pioneered micro-reactor technology which is the basis of several company start-ups committed to the development of "Tools for DNA Diagnostics" technology.
- Pioneered generic Bio-Catalytic Reactor technology. This lead to DuPont programs at U. of CA at Berkeley and MIT. This is a current central topic in Renewable Energy Technology today.
- Designed Ion Sensing FET's for the Clinical Market and studied manufacturability issues with P. Cheung (University of Washington).
Developed Hybrid Circuit based sensors for the emerging Point-of-Care market.
- Sponsored Research and Key University Initiatives:
 - Founding Member of first NSF-ERC at BSAC and contributing IAB member
 - Resident Engineer at WIMS Program, U. of MI, Ann Arbor MI.
 - IAB Member/ Board of Dir. at U. of Washington (Seattle), Sensors Res. Center

Technicon Instruments Inc., Research Scientist 1973-1980

- Introduced Chemical Sensors to the Clinical Diagnostics Industry
- Pioneering development of electrochemical solid state sensing devices for medical use in human blood.

Academic Preparation:

- A.B Chemistry/Mathematics, Syracuse University (1965)
- PhD Analytical Chemistry, Syracuse University (1970)
- Postdoctoral, University of Michigan (1971)
- Postdoctoral , Penn State University (1972)
- Kettering Research Foundation: Nitrogen Fixation Research (1973)
- Petroleum Research Fund Fellow

20+ publications and 10 issued patents, others pending.

Relevant Publications

1. S.J Pace and R. Brown, "Sensor Micro-Arrays Provide Application Specific – Complete Analytical Solutions" SENSORS EXPO 2002
2. S.J.Pace, "Integrated Multisensor Technology: Biosensors for the Future", Am. Clinical Laboratory, June, 1994
3. J. Bass and S.J. Pace, "Theoretical Modeling of Ion Sensing Membrane" Proc. of the Electrochemical Soc. (1993)
4. S.J. Pace and J. Hamerslag, "Thick Film Multilayer Ion sensors for Biomedical Applications", in Biosensors and Chemical Sensors, ACS Symposium Series, 487, p261, 1991
6. PW.Cheung, S.J. Pace and R.P. Bigliano, "ISFET for Clinical Applications", Proc. 2nd International Conference on Sensors & Actuators, Japan (1987)
7. S.J. Pace , "Chemically Sensitive Electronic Devices" 1980, Elsevier Sequoia

James R. Woods
Ben Franklin Technology Partners SE PA
Building 100, The Navy Yard
Philadelphia, PA 19112
jim@sep.benfranklin.org

PROFESSIONAL EXPERIENCE

- 1996-Present **BEN FRANKLIN TECHNOLOGY PARTNERS, Philadelphia, PA**
Technology Commercialization Group
Advising small- and mid-sized companies on technical issues and financial resources generally related to technology commercialization and new product development. Seeking new regional initiatives for technology development and commercialization collaboration between universities and the private sector.
- 1992-1995 **SMITHS INDUSTRIES AEROSPACE, Clearwater, FL**
Senior Marketing Manager
Developed new business for avionics products; primary focus was on technology upgrades for existing aircraft systems.
- 1987-1992 **AEL DEFENSE CORPORATION, Lansdale, PA**
Senior Program Manager
Directed engineering and manufacturing development projects for military electronic systems and aircraft modifications.
- 1985-1986 **AYDIN COMPUTER SYSTEMS, Horsham, PA**
Program Manager
Directed major project for military electronics, and coordinated new business development activities for aircraft cockpit displays.
- 1984-1985 **SONALYSTS INC., Warminster, PA**
Principal Engineer
Conducted engineering analyses and system requirements studies; also provided technical consulting to prime defense contractor.
- 1982-1983 **KAISER ELECTRONICS INC., San Jose, CA**
IR&D Program Manager
Directed independent research and development projects for advanced cockpit displays in tactical aircraft.
- 1979-1982 **NAVAL AIR DEVELOPMENT CENTER, Warminster, PA**
Deputy Director
Principal US Navy advisor to Aircraft and Crew Systems Technology Department; also supervised support staff and division managers.

EDUCATION

- 1962 **B.S.**, U.S. Naval Academy, Engineering
1972 **Ph.D.**, U.S. Naval Postgraduate School, Aeronautical Engineering
1977 **M.S.**, University of Southern California, Systems Management

PERTINENT EXPERTISE

Program Management: Developed and executed comprehensive program plans containing detailed schedules and budgets. Conducted regular technical and financial reviews for customers and senior management. Continually met program milestones on schedule and within budget, resulting in increased profits and leading to additional orders. Directed all phases of engineering research and development from system design and development to environmental qualification tests. Coordinated laboratory and operational testing of prototypes. Transitioned electronic products into production. Controlled costs for engineering and manufacturing manpower and material.

Engineering Management: Directed project management and engineering staff working on aircraft modification programs. Initiated project teams to enable better budget adherence, task accountability and schedule performance. Restructured job performance objectives to focus project managers on company business goals. Prepared and negotiated technical statements of work and procurement specifications. Coordinated source selection evaluations of competitive proposals from subcontract suppliers. Well-versed in government and commercial contract and specification requirements.

Marketing Management: Identified potential customer requirements that matched company capabilities and strategic business objectives. Implemented improved multi-year business planning process. Conducted market and competition analyses leading to informed bid/no-bid decisions. Initiated customer contacts and subsequent follow-up resulting in more proposal efforts and new business. Prepared technical, management and cost proposals responding to competitive solicitations for electronic systems and subsystems. Organized complex work breakdown structures for bids. Evaluated manpower and material cost estimates. Developed and presented comprehensive pricing reviews and recommendations to executive management. Participated in customer pre-award and post-award surveys.

Richard P. Thompson
Ben Franklin Technology Partners
2 E. Court St., Doylestown, PA
dick@sep.benfranklin.org
215-489-9949, Extn#2

PROFESSIONAL EXPERIENCE

- 1999-Present **BEN FRANKLIN TECHNOLOGY PARTNERS**
Assist Pennsylvania companies to seek new product commercialization through the adaptation and development of new technologies. Also provide numerous services relating to funding, technology acquisition and use.
- 1999-Present **TECH SCOUTS INC**
Work with a group of technical professionals under competitive contracts to provide evaluations to University Clients (Johns Hopkins, APL) with regard to the commercial viability of various developed technologies.
- 1996-Present **L2B ENVIRONMENTAL SYSTEMS**
Part Owner (2 additional partners) of a small Early Stage Company in Canada, manufacturing a product to sterilize air for mainly medical/ health applications for home use.
- 1995-Present **THOMPSON INTERNATIONAL CONSULTING, INC.**
Thompson International is an International Business Consulting Firm, specializing in Marketing and Industrial Products. Presently involved with major Japanese client (Fuji Electric) in various aspects of International Business Development in several different business sectors. Experience in the following Sectors: Instrumentation and sensors, Process Control, Consumer Health Products, Precision Air Conditioning, and Water and Waste Water Treatment.
- 1967-1995 **FISCHER AND PORTER COMPANY, Warminster, PA** (Instrumentation and Process Controls Manufacturer)
Group Vice President, Pacific Operations
Responsibilities: Managed all activities in Asia-Pacific Region. Profit and loss responsibility for 3 subsidiary companies in Australia, Canada and Mexico. Sales of \$25 million, 200 plus employees. Directed network of 20-25 representatives and distributors generating \$15 million in sales. Led team to develop computer model to facilitate development and integration of international budget by product type. Served as Chairman and/or Board Member for these subsidiaries. Reported to the President.

EDUCATION

- | | | |
|---------|------------------------|--|
| 1964 | B.E.E.E. | Villanova University, Electrical Engineering, |
| 1966-68 | Masters Degree: | University of Pennsylvania, Wharton Graduate School, Evening Division (Did not complete) |
| 1975 | P.E. | Registered Professional Engr. - Control Systems |

KEY ACCOMPLISHMENTS

- 1993 Negotiated \$3 million joint venture with Japanese company for factory in France.
- 1993 Negotiated agreement for software with Korean company, which yielded \$2 million in revenue.

- | | |
|------|---|
| 1992 | Negotiated a technology transfer with Korean company for new disinfection technology. |
| 1991 | Established new distribution system in region for disinfection products. |
| 1989 | Managed transfer of manufacturing of ultra-violet technology product from U.S.A. to Canada. |
| 1985 | Established new subsidiary company in Singapore. |

PERTINENT EXPERIENCE

Group Vice President with over 30 years of progressive experience involving engineering, sales, marketing and operations management in domestic and international markets. Widely traveled, lived outside the U.S.A. for 4 years. Dual national holding both US and Irish citizenship. Experience includes:

- | | |
|--|---|
| <ul style="list-style-type: none"> ▪ International Business Operations ▪ Strategic Planning ▪ Joint Ventures ▪ Licensing | <ul style="list-style-type: none"> ▪ High Level Selling ▪ Export Sales Management ▪ Find/Develop International Representatives |
|--|---|

OTHER EXPERIENCES

- Traveled extensively in developing and developed countries discussing instrumentation experiences with personnel at all levels of operation.
- Assisted U.S. Department of State in a training program for Foreign Service Officers in export promotion.
- Served for 3 years as the Chair of the Emerging Technologies National Conference for the Instrumentation, Systems and Automation Society (ISA) 2001-2004.
- Currently Review Phase 1 and 2 SBIR submissions for NSF.
- Presently Co-PI for the Villanova NSF Partnership for Innovation Grant.
- Serve on the Innovation Partnership Funding Committee
- Member of the Pa. Green Building Alliance Board of Advisors
- Member of the Villanova College of Engineering Electrical and Computer Engineering Advisory Board.

Jaron J. Rhodes

jaron@sep.benfranklin.org / jaronjr@alumni.upenn.edu • 215-972-6700, x3214

EMPLOYMENT EXPERIENCE:

Ben Franklin Technology Partners of Southeastern Pennsylvania (www.sep.benfranklin.org) 2006-Present

Ben Franklin invests in innovative enterprises and creates commercialization pathways that generate wealth through science and technology. Ben Franklin provides entrepreneurs and established technology enterprises with the *Capital, Knowledge* and *Networks* to compete in the global marketplace, and has a current company portfolio representing more than \$24 million in invested funds.

Manager, Marketing and Communications Department:

Develops and implements brand management strategies to promote the organization's mission, programs and companies to entrepreneurs, researchers and investors throughout the region and nationally.

LobeMan Group, LLC (www.lobeman.com) – Wayne, Pennsylvania 2000 - 2006

LobeMan Group develops and brings to market a variety of personal communications and entertainment tools through technology development, patent pending innovative design, product manufacture and marketing.

Co-Founder and Chief Technology Officer:

- Invented LobeMan patent pending over-the-ear communications form-factor for consumer product applications
- Designed and prototyped LobeMan FM Radio, Hearing AmpAfone, Mobile Headset, and AM Radio
- Strategized with PR and marketing firms for product launch, leading up to presentation of products at 2004/2005 Las Vegas Consumer Electronics Show
- Positioned retail products in Target, Discovery Channel Stores, and QVC Television Shopping Network
- Received national press from the New York Times, ESPN2's Cold Pizza, and WCBS-TV, New York
- Developed graphic design for product packaging, website and client marketing applications
- Facilitated consumer psychology focus groups and implemented their findings
- Concentrated on product marketing and brand management
- Established manufacturing and production lines in Hong Kong and Shenzhen/Dong Gong, China
- Facilitated quality control and supply chain relationships in China
- Sold promotional branded LobeMan radios to over 40 radio stations and private companies across the country, 100,000 total radios sold in the U.S.
- Received financing from Pine Ventures Capital Group; offered financing from Ben Franklin Technology Partners (www.benfranklin.org/)
- Researched intellectual property laws and patent composition

QVC, Inc. Television Shopping Network (www.qvc.com)

2005 *Technology expert:* On-air repeat guest

Vector Data Services, Inc. A business management survey/consulting company (www.vds450.com) 2003 – 2005

Consultant: Technology / Survey processing

Information Systems and Computing Department, University of Pennsylvania 2000 – 2004

Consultant: Telecommunications Department / Digital Video Production

Center for Clinical Epidemiology and Biostatistics, University of Pennsylvania 2000 – 2001

Research Assistant: Department of Transportation national safety studies under Dr. Charles Branas

EDUCATION:

University of Pennsylvania, College of Arts and Sciences – Philadelphia, Pennsylvania

Bachelor of Arts, Class of 2002

Focus in Cognitive Science, Psychology

INTERESTS: International travel, photography, electronic hobbyist, car enthusiast, pet owner

Jeffery E. Gatter
PO Box 501
Unionville, PA 19375
484-560-6888
jeffgatter@gmail.com

Areas of Expertise:

Lending & deposit operations
Computer system design & integration
Regulatory compliance

Experience:

12 Years Bank President
5 Years Chief Information Officer
3 Years Controller

Industry Affiliations:

Member, Governor's Task Force to
Help Working Families

Former Chairman, Philadelphia
Regional Recovery Coalition
(DeVal 1st)

President, Pennsylvania Financial
Services Association

Education:

B.a. Psychology, Furman University

M.S. Computer Science,
Drexel University

Post-graduate studies in computer
science & mathematics,
Villanova University

Other Interests:

High school rugby coach
Boy Scout troop assistant leader
Youth group leader

Professional Experience:

AFC First Financial / Great Bear Bank 2007 to Present *Sr Vice President*

Created and managed a new residential mortgage division. This included hiring and training staff, creating accounting standards and controls, and creating policies and procedures to originate, service, or sell loans in the secondary mortgage loan markets. Created and marketed a new Energy-Lending home improvement loan division, utilizing available state programs to promote energy efficient home improvements. We achieved the highest loan volume in Pennsylvania.

Public Savings Bank 1986 to 2007 *President*

Hands-on approach to all areas of management necessary to run an FDIC-insured financial institution. Personally hired bank personnel and then created and implemented daily functions of the bank, including the following:

- Managed loan origination and servicing for the entire bank.
- Personally instituted and controlled all legal collection efforts
- Developed and implemented all bank policies and procedures.
- Created, trained, and managed a staff of 20.
- Grew deposits by 400%.

Created and managed a series of operating committees to test and report on all aspects of daily bank operations.

Chief Information Officer

Automated all aspects of daily bank operations. Wrote or purchased software, created a General Ledger interface from the various deposit and loan software packages to consolidate the daily accounting function. Created security and privacy policies and procedures for all aspects of data processing.

Controller

Created General Ledger transactions and prepared monthly financial reports, reported directly to the bank Board of Directors.

Public Finance Service, Inc. 1979 to 1986 *Vice President*

Supervised the origination and servicing of loans in a 27-branch consumer finance company. Analyzed branch delinquency, volume, profitability, and loan security. Hired staff as necessary.

Peter Krajsa

Peter Krajsa serves as Chairman and CEO of AFC Financial Corporation, a position he has held for 32 years (since 1978).

Based in Allentown, Pennsylvania, AFC First specializes in energy efficiency and renewable energy financing programs, primarily in the residential market. One of three FannieMae approved Energy Lenders in the nation, AFC First operates *EnergyLoan* programs from Maine to the Carolinas through a network of over 2,000 Approved Contractors, utilities and manufacturers. The company created and helps to manage Pennsylvania's state program for energy efficiency home improvements, Keystone HELP, and also administers Connecticut's residential solar leasing program, CT Solar Lease.

Mr. Krajsa received a BS Economics in 1978 from the University of Pennsylvania – The Wharton School.

ROGER E. CLARK, Esq.

The Reinvestment Fund
718 Arch Street - Suite 300 North
Philadelphia, Pennsylvania 19106
(p) 215.574.5814
roger.clark@trfund.com

Experience:

TRF Sustainable Development Fund, www.trfund.com/sdf, The Reinvestment Fund, 718 Arch Street Suite 300 North, Philadelphia, PA 19106-1591. Manager for Technology and Policy. October 1998 to present.

The Sustainable Development Fund (SDF) was created by the settlement agreement in the PECO Energy restructuring proceeding which I negotiated (see below) to provide financial support for renewable energy and energy conservation projects and businesses. I was instrumental in creating the organizational structure of SDF, including its bylaws, board of directors and other procedures. I designed and manage the wind program that is providing \$11.5 million of wind energy production incentives to seven Pennsylvania wind farms. I developed the solar photovoltaic program which has supported approximately 185 solar installations in southeastern Pennsylvania. I also manage the public education initiatives and the core grant program. I evaluate the technical and financial merits of the grant applications for all of these programs. I also handle the technical underwriting for the TRF Energy loan applicants. I also perform legal duties for TRF, representing the organization in the Act 129 implementation proceedings (utility conservation programs) and the Exelon/PSEG merger proceeding in Pennsylvania and New Jersey and the Constellation/FPL merger proceeding in Maryland. I have represented TRF and SDF in testimony before the Pennsylvania General Assembly and the Pennsylvania Public Utility Commission on energy legislation and policy.

Clean Energy States Alliance, www.cleanenergystates.org, a project of The Clean Energy Group, Montpelier, Vermont. Project Manager. July 2000 to June 2005.

I worked part-time as project manager of the Clean Energy States Alliance (formerly the Clean Energy Funds Network), a project that provides information and coordination services to (and is funded by annual dues from) the 14 states that have created clean energy funds. CESA also developed research projects and other joint initiatives of the member funds. I managed the public education project which developed new branding for clean energy and produced a series of television and radio spots. I also handled the community wind project and the solar activities.

Pennsylvania Environmental Resources Council, a project funded by the Heinz Endowments. Managing Attorney. March 1997 to June 2000.

I worked with several other attorneys to represent a coalition of environmental and consumer groups in a variety of electric utility restructuring proceedings before the Pennsylvania Public Utility Commission. The cases included a number of the early generic policy and rulemaking proceedings as well as five major utility restructuring cases (PECO Energy, PP&L, GPU, Duquesne Light and West Penn). I was the attorney in the PECO Energy, Duquesne and West Penn cases and supervised counsel in the PP&L and GPU cases. We secured a number of important environmental provisions in these cases, including a systems benefits charge for renewable energy and energy conservation, new net metering and interconnection rules, a renewable portfolio standard, increased budgets for low income energy conservation and a low

income pilot program to install photovoltaic and solar water heating systems. I also represented these clients in the DQE/First Energy merger proceeding, the DQE generation auction case, the PECO Energy advertising complaint and the renewable energy pilot program.

Nonprofits Energy Savings Investment Program, www.trfund.com/NESIP, The Reinvestment Fund, Cast Iron Building - Suite 300 North, 718 Arch Street, Philadelphia, PA 19106-1591, Program Director. January 1993 to June 2000.

At the request of The Pew Charitable Trusts, I designed, implemented and managed NESIP, a program to help nonprofit organizations reduce their energy costs through energy efficiency and other strategies. NESIP site-specific energy audits, design assistance for new construction and major renovations, low-interest financing, technical and project implementation assistance and energy education. NESIP provided services to approximately 275 clients. I managed a technical staff of three individuals and the occasional services of another three professionals. NESIP is continuing as a program of The Reinvestment Fund.

Pennsylvania Energy Office, Harrisburg, Pennsylvania. Chief Counsel (January 1986 to January 1993), Assistant Counsel (May 1980 to January 1986) and Associate Director for Renewable Energy (September 1983 to January 1986).

As Chief Counsel, I was responsible for representing the agency in administrative proceedings before the Pennsylvania Public Utility Commission and the Federal Energy Regulatory Commission. I also represented the office in trial and appellate court work before the Board of Claims, Commonwealth Court and the Pennsylvania Supreme Court. I provided legal counsel to the agency's directors and review and signed all agency contracts. I served as counsel to the Variance Board established by the Building Energy Conservation Act. I was also responsible for the agency's energy policy work and served as manager of the Energy and Power Task Force and project leader for *An Energy Policy for Pennsylvania*, the 1988 state energy policy. I represented Pennsylvania in the National Governor's Association's policy efforts regarding a national energy policy and global climate change. I was responsible for directing the agency's demand-side management initiative and forming a building technology research consortium.

Legal Services, Inc., Carlisle, Pennsylvania. Managing Attorney. June 1979 to May 1980.

I was the managing attorney of a legal services office which had four attorneys, two paralegals, four support staff and six part-time law students. I was responsible for the overall management and direction of the office, supervision of attorney legal work, and developing good working relationships with the community. Approximately half of my time was spent on an individual caseload, specializing in consumer, contract, and utility/energy matters. I was active in the statewide legal services utility specialists group.

Alaska Legal Services Corporation, Fairbanks, Alaska. Staff Attorney. October 1976 to August 1978.

As staff attorney, my duties included client intake and interviewing, case research and preparation, representation of clients in state and federal administrative proceedings, trial work in state and federal court, and appellate work in the Alaska Supreme Court and the U.S. Department of Interior's Board of Land Appeals. I also made regular visits to isolated Native villages in interior Alaska and trained and supervised a paralegal working in Tok.

Education:

Legal: The National Law Center, George Washington University, Washington, D.C.
Juris Doctor, May 1976

Admitted to the Pennsylvania Bar, December 1976

College: Carleton College, Northfield, Minnesota
Bachelor of Arts, June 1973 (Government and International Relations)

Junior year was spent in Aix-en-Provence, France

Other Service:

Energy Coordinating Agency, director.
Mid-Atlantic Green-e Advisory Committee, member.
Philadelphia Million Solar Roofs Program, member.
St. Thomas Church Whitemarsh, vestry member.

Donald R. Hinkle-Brown

718 Arch Street | Philadelphia, PA 19106 | (215) 574-5829 | Donald.hinklebrown@trfund.com

Professional Experience:**The Reinvestment Fund, Inc.**

(previously known as the Delaware Valley Community Reinvestment Fund, Inc.)

2005 – Present President, Lending and Community Investing.

Mr. Hinkle-Brown has full responsibility for TRF's lending and investing, including oversight of charter school, housing, commercial real estate, business and energy lenders, management of the NMTC program and all related capitalization. His responsibilities include review and approval of loans up to staff lending limits of \$500 thousand, participation and presentation of loans for approval at monthly loan committee meetings, monitoring ongoing performance of the loan portfolio and overseeing loan portfolio reviews which includes an assessment of the current underwriting classification of portfolio loans. He works closely with borrowers, loan officers and loan committees to minimize risk of loss on loans.

He leads TRF's NMTC team, helping place our 2004, 2006 and 2008 NMTC allocations totaling \$188.5 million into projects serving distressed communities in our region. He also manages assets and risks of separate pools of capital such as TRF Collaborative Lending, Inc., a \$30 million syndicated facility for large scale construction loans which has \$0 in losses over its 10-year lending history.

2004 – 2005 Executive Vice President, Commercial Finance

With the advent of TRF's New Markets Tax Credit program and a new program to finance supermarkets in underserved communities across Pennsylvania, the Commercial Finance Group was formed in 2004. In addition to these two new programs, this group also includes the existing community facility, non-profit energy efficiency, small business and SBA lending programs. Manager of a staff of 10 with lending, investing, underwriting, monitoring, relationship management and technical assistance functions. Responsibilities for raising debt and equity capital, and grant resources for these programs.

2002 – 2004 Executive Vice President, Community Development

Leads and manages all community development programs at TRF, which includes affordable housing, community facilities, non-profit energy efficiency lending, pre-development finance, and various technical assistance programs. Together with the EVP of Economic Development, manage the marketing and branding of TRF and its programs. Manager of a staff of 14 with lending, underwriting, monitoring and relationship management functions. While in this position, managed the creation of a \$45 million joint venture with NCB Development Corp for the finance of charter schools from NY to VA which included securing a \$6.4 million grant from the U.S. Department of Education; increased the size of CLI from \$25 to \$36 million and opened this construction pool to non-housing product; coordinates the organization's strategy for applying New Markets Tax Credits in its business lines through a \$38.5 million NMTC allocation.

2000- 2002 Managing Director – Capitalization, Public Affairs and Program Development

A senior position at TRF with responsibility for capitalizing new and existing lending and investment pools, linking these pools to new and existing programs, and managing the organizations overall public affairs and corporate communications to support these activities. While in this position, managed the restructure of CLI into a \$25 million syndication with JP Morgan Chase, launched the TRF Children's Fund, and structured a JV with NCBDC for charter schools which was successful in raising over \$51 million in grants and loan capital. Manager of a staff of four with the following additional functions: Investor Relations, Publications, Media Relations, Events, Operating Grant Development.

Director of all affordable housing, community facility, day care and energy efficiency loan programs. With a lending staff of eight and an administration and loan accounting staff of seven. Leading this function involved authoring and revising loan underwriting and lending policies, product and program development, managing three loan committees of professional volunteers, marketing, and forging strategic relationships with public funders and institutions of place. In addition to lending products, this group also is agent for a two moderate rehabilitation program of the City of Philadelphia Redevelopment Authority.

Responsible for the design, creation and management of this multi-bank construction pool for affordable housing. CLI is nationally known as a model bank pool with an innovative just-in-time funding design that provides unprecedented delegation from the banks to CLI. Responsible for capitalization and lending of this pool which grew from \$4 to \$25 million in available capital from over 20 banks and other financial institutions. During tenure in this position, CLI was approved as a secondary market originator and servicer, and won a HOPE-3 grant in joint venture with a client CDC. Management responsibilities included enlisting volunteers for the CLI board of directors, and building acceptance in the local banking community for CLI's underwriting standards.

The first career loan officer hired by TRF, responsibilities included creation of a construction loan product which later grew into CLI, a pre-development loan pool which has since grown to over \$3 million, and standardizing and documenting loan policies and underwriting standards. Credit relationships included various CDCs, regional non-profits, tax credit partnerships, for-profit developers, land trusts, cooperatives and public agencies.

Community Reinvestment Officer and AVP in the Real Estate Lending group. Financed a combination of owner-occupied real estate and tract development in a personal portfolio in excess of \$100 million.

Hired for the Management Training Program involving formal credit experience and rotating tour through the bank's functional departments. Ending tenure as an AVP in the Real Estate Lending group, with a \$100 million portfolio of tract development and commercial construction projects, and sole credit officer for a \$1 billion portfolio of permanent commercial mortgages throughout New Jersey. Special responsibilities included representing the bank on various CRA and community relations committees, including the TRF Loan Committee and TRF Board of Directors; officer in charge of shore hotel workouts from Brigantine to Cape May.

Community Development Trust, a Community Development REIT – Director (founding to present)
Urban Studies lecturer, Temple University (presently)
Housing Partnership Network, HPF Loan Committee (01-present)
1260 Corporation, a Philadelphia MH/MR housing provider – board of directors (00-present)
Greater Philadelphia Urban Affairs Coalition – member Community & Econ. Dev. (96-present)
The Philadelphians M.C., member (98-present), past Co-Captain (00-01)
Calcutta House, an AIDS Hospice – President (97-00), board of directors (92-00)
Local Initiative Managed Assets Corp., a LISC affiliate – Director (96-00)

Jeremy Nowak
The Reinvestment Fund
718 Arch Street
Philadelphia, PA 19106

WORK EXPERIENCE

Jeremy Nowak is President and Chief Executive Officer of **The Reinvestment Fund**. Jeremy was the founder of TRF in collaboration with a small group of civic and religious community activists in 1985. Under Jeremy's leadership, TRF has grown from a small community development organization to a \$570 million leader in economic and neighborhood revitalization. TRF's mission is to create economic opportunity and build wealth for low wealth communities and families.

TRF accomplishes its mission by making loans and equity investments in support of housing and commercial real estate projects, small businesses, community facilities, and energy conservation programs. The Reinvestment Fund also provides policy analysis and high quality data in support of its mission. The Fund is a thought leader in the creative use of geo-spatial data to facilitate investments into distressed urban markets. It recently launched www.policymap.com a national mapping tool to aid public, non-profit, and private organizations in their investment decision-making.

During the past two decades, TRF has:

- Provided over \$900 million in loans and investments
- Financed 18,500 units of affordable housing, 7.8 million square feet of commercial real estate and community facilities
- Financed more than 9,700 child care slots
- Created or preserved more than 42,000 jobs
- Provided loans to 45 charter schools that enroll more than 27,000 students
- Launched the *Collaborative Lending Initiative*, a bank consortium that has increased construction financing for affordable housing projects
- Created two private equity funds whose purpose is to channel equity and sub-debt into businesses that create employment for entry level workers
- Provided planning and strategy consultation to Mayor Street's (Philadelphia) \$300 million anti-blight program and the State of New Jersey's Camden revitalization efforts
- Provided financing to numerous clean and renewable energy projects including wind, making Pennsylvania the leading producer of wind energy east of the Mississippi River.
- Received \$188.5 million in New Market Tax Credits to finance development serving disadvantaged communities throughout the Mid-Atlantic Region.

AWARDS AND HONORS

Selected in 1994 to receive *The Philadelphia Award*, the city's highest civic honor, Mr. Nowak was recognized as "that individual who has done the most to advance the best and largest interests of the community."

VOLUNTEER WORK

Mr. Nowak is a board member of the Philadelphia Federal Reserve Bank. He chairs the Board of Mastery Charter Schools Foundation, a network of four inner city middle & high schools in Philadelphia; and Alex's Lemonade Stand, a charity that has raised more than \$25 million for pediatric cancer research during the past four years.

He is currently a Fellow at the Aspen Institute, in a program for entrepreneurial leaders in education and a member of a Harvard University (Kennedy School) Executive Session on transforming cities through civic entrepreneurship.

In addition to his work in the Philadelphia area, he has provided assistance to a dozen development finance institutions in the United States, China, Latin America, and Africa.

RECENT PUBLICATIONS

The author of numerous articles, recent publications examine policy options for distressed cities; development finance in older industrial cities; and the role of art and culture in neighborhood regeneration.

EDUCATION

Pennsylvania State University, BA in Philosophy (Phi Beta Kappa, 1973)
New School for Social Research, PhD Cultural Anthropology (1986)
(Alfred Schutz Dissertation Award)
Villanova University, Honorary Doctorate
LaSalle University, Honorary Doctorate

ROBERT G. SANDERS

7022 McCallum Street, Philadelphia, PA 19119 · (215) 574-5850 (work) · (215) 248-5594 (home)
e-mail: robert.sanders@trfund.com

QUALIFICATIONS SUMMARY

Experienced development professional with more than 20 years of experience in economic development and energy-related commercial finance. Strong lending and investment underwriting and portfolio management skills. Demonstrated success in developing new lines of business and rolling out economic development and sustainable energy finance products and programs to new markets.

WORK EXPERIENCE

THE REINVESTMENT FUND, Philadelphia, PA (1998-present)

The Reinvestment Fund (TRF) is a large regional non-profit development finance corporation that operates in five states and is capitalized with funds from more than 850 investors.

Managing Director, Energy Finance and Fund Manager, Sustainable Development Fund (1999 – present)

Manage the Sustainable Development Fund (SDF), a \$32 million fund that provides company and project financing for renewable energy, advanced clean energy and energy conservation technologies. Responsible for SDF's core lending and investing activities and special program initiatives (wind power development, photovoltaics and renewable energy public education). With Blue Hill Partners, created the Pennsylvania Advanced Industrial Technology Fund to make equity investments in early stage clean energy technology companies.

Senior Loan Officer, Small Business Loan Group (1998 – 1999)

Jumpstarted TRF's small business lending activities. Secured for TRF a U.S. Small Business Administration guaranty license, which allows TRF to originate SBA-guaranteed loans. Marketed the Small Business Loan Group's loan products, reviewed and approved commercial loan requests, established policies and procedures for small business lending, and managed an active commercial loan portfolio.

CORESTATES BANK, NA, Philadelphia, PA (1983-1998)

Held increasingly responsible positions managing community development activities of a \$45 billion bank-holding company with primary markets in New Jersey, Pennsylvania and Delaware.

President, CoreStates Community Development Corporation (CCDC), (1997 - 1998)

Managed a non-profit community development financial institution capitalized by CoreStates Financial Corp to support community renewal and poverty alleviation. Increased capitalization from \$1.1 million to \$6.5 million and refocused investment activities from housing development to an emphasis on economic development ventures that create jobs and form businesses. CCDC's investment tools included subordinated and mezzanine debt and equity investments.

Community Development Investment Analysis and Strategic Planning, (1996 -1998)

Underwrote economic/community development ventures and structured CoreStates participations using all available Corporate Community Development (CCD) tools, including capital allocations from the CoreStates Community Development Corporation (CCDC), commercial real estate and non-real estate loans, low income housing tax credit investments, and community development contributions as development project funds and credit enhancement. Managed CoreStates' two Philadelphia Plan commitments in addition to an active community development commercial loan portfolio.

Manager, Planning and Community Development Initiatives, (1991 - 1996)

Structured CoreStates participations in major community development initiatives and managed an active community development commercial loan portfolio. Developed a five-year strategic plan for Corporate Community Development (CCD), a comprehensive community development function involving 60 professional staff servicing a three-state geographic region. Planned and implemented CCD's secondary market sales of SBA-guaranteed economic development loans.

Commercial Loan Officer, Community Business Lending Group (Corporate Community Development), (1983-1991)

Approved commercial loans and provided relationship management to an economic development portfolio of start-up and rapidly expanding businesses and non-profit organizations (loan portfolio of 90 borrowers and \$16 million in commitments).

PHILADELPHIA COMMERCIAL DEVELOPMENT CORPORATION, Philadelphia, PA (1980-1983)

Business Development Specialist

Devised development strategies, conducted market studies, prepared business plans, and secured financing for private clients and City-sponsored projects. Managed development teams for a professional services center, a retail/services center, and a "theme" retail food center.

EDUCATION

UNIVERSITY OF CALIFORNIA, BERKELEY

Master's program in City Planning (Community Economic Development), M.C.P., 1980.

Recipient of the Regent's Fellowship and Mellon Fellowship.

STANFORD UNIVERSITY

Values, Technology and Society (Urban Studies), B.A., 1974.

Graduated with departmental and school honors.

VENTURE CAPITAL INSTITUTE, ATLANTA, GA

National Venture Capital Association, Certificate of Completion, 2002.

NATIONAL DEVELOPMENT COUNCIL, PHILADELPHIA

Advanced Business Credit and Financial Analysis, 1981.

STANFORD-IN-ITALY, FLORENCE, ITALY

History, literature, art and architecture, 1971 - 1972.

ORGANIZATIONAL AFFILIATIONS

BLUE HILL PARTNERS, PHILADELPHIA

Advisory Board (2002 – present)

CLEAN ENERGY GROUP, MONTPELIER, VT

Board of Directors, Treasurer (2003 – present)

CLEAN ENERGY STATES ALLIANCE, MONTPELIER, VT

Board of Directors, Secretary/Treasurer (2003 – present)

PENNSYLVANIA ADVANCED INDUSTRIAL TECHNOLOGY FUND, PHILADELPHIA

Investment Committee, Member (2002 – present)

PENNSYLVANIA ENERGY DEVELOPMENT AUTHORITY, HARRISBURG

Member (2009 – present)

ILENE S. BURAK
7042 Greene Street ♦ Philadelphia, Pennsylvania 19119 ♦ (215) 849-0209

EXPERIENCE

Philadelphia Industrial Development Corporation, Philadelphia, PA

4/06-present

Vice President – Corporate Counsel

8/09-present

Serve as corporate legal officer to PIDC, its subsidiaries and affiliates and the Philadelphia Authority for Industrial Development, which responsibilities include:

- Managing and providing direction to staff assigned to handle a wide array of complex matters including grants, contracts, administrative and regulatory issues, property acquisitions and sales, lending, as well as other general and transactional matters;
- Performing and overseeing the review, research, drafting and development of legal documents, such as grants, contracts, leases, real estate purchase and sale agreements, loan documents and other legal documents as required;
- Reviewing legal documents, corporation policies, procedures and guidelines to ensure compliance with legal and Federal, Pennsylvania and City of Philadelphia regulatory requirements;
- Providing legal and business insight on day-to-day issues;
- Provides counsel on business, professional, regulatory and governance matters to management and the Board of Directors, its advisory and executive committees as needed;
- Participating in the research, development and maintenance of bylaws and board resolutions and providing advice to Board members regarding conflict of interest disclosures policy;
- Managing and overseeing all outside counsel; and
- Providing legal guidance on significant PIDC initiatives.

Senior Real Estate Manager

4/06-8/09

Involved in all aspects of acquisition and disposition of real estate for purposes of economic development in the City of Philadelphia, including:

- Oversaw of the City of Philadelphia's Surplus Real Estate Assets Program, in which of over \$40 Million in real estate assets had been slated for sale, lease or other disposition, to generate revenue for the City's General Fund;
- Oversaw Request for Proposals and Request for Qualifications processes for development of publicly held real estate;
- Oversaw acquisition of property and property interests along the Schuylkill and Delaware Rivers for the purpose of recreational trail and economic development;
- Performed all legal work necessary for real estate acquisitions and sale, lease and other dispositions of land; and
- Coordinated and oversaw outside counsel in their representation for large scale real estate transactions.

Pepper Hamilton LLP, Philadelphia, PA

4/05-3/06

Associate

Represented clients in all types of real estate matters, including commercial, industrial, residential and retail asset acquisitions, financing, construction and operations; Negotiated leases on behalf of a retailers, office and industrial users and landlords for retail, office and industrial properties. Representations included:

- Drafting and negotiating leases for office and industrial spaces for one of the region's largest, privately-owned developers of office and industrial properties, and assisting with acquisitions, dispositions and financing for the portfolio;
- Negotiating leases for a regional retail tenant in the Southeastern U.S.;
- Representing an industrial user in the acquisition and financing (both public and private funding) of its new facility;
- Representing a developer in acquiring land and obtaining financing for a proposed 280,000 square foot shopping center;
- Assisting with a land acquisition for a "big box retailer" and drafting and negotiating the Easements with Covenants and Restriction Agreement and the Development Agreement;
- Representing and counseling retailers in negotiating shopping center leases; and
- Representing high net-worth clients in the acquisition and sale of private residences

City of Philadelphia, Law Department, Philadelphia, PA

12/02-4/05

Assistant City Solicitor

Represented and counseled the Department of Public Property, the Fairmount Park Commission, and the Commerce Department in all aspects of real estate and economic development; Acted as counsel to the Art Commission; Drafted and negotiated all forms of real estate agreements including leases, subleases, agreements of sale, license agreements, operating agreements, right of entry agreements, easements, resolutions for Commission approval, and ordinances for City Council approval; Reviewed federal loan and grant documents; Oversaw loan workouts; Assisted with bond offerings.

Klehr, Harrison, Harvey, Branzburg and Ellers, LLP, Philadelphia, PA Summer 2000 and 9/01-12/02
Associate

Assisted in implementing a leasing program for a national retail tenant and negotiated leases on its behalf; Reviewed telecommunication license agreements; Drafted lease amendments for office buildings; Drafted PA Act II, Buyer-Seller Agreements; Reviewed title reports; Performed due diligence for large corporate and real estate related transactions; Assisted with closings for various transactions, including: drafting corporate resolutions, opinion letters, deeds, mortgages, mortgage modification agreements; reviewing contracts and leases; organizing documents and preparing closing binders.

The Honorable Jane Cutler Greenspan, Court of Common Pleas, Philadelphia, PA 5/99-4/00
Legal Intern

Drafted opinions and memoranda; Researched pre- and post-trial motions; Assisted in court management; Attended court proceedings including trials, PCRA, VOP and sentencing hearings, and jury selections.

Classic Management, Inc., Philadelphia, PA 7/90-7/98
Positions held:
Property Manager 8/97-7/98
Leasing Manager 10/93-11/95
Assistant Property Manager 7/90-10/93

COMMUNITY ORGANIZATIONS

The Attic Youth Center 9/08-Present
Treasurer and the Executive Committee member of this organization, which creates opportunities for Lesbian, Gay, Bisexual, Transgender, and Questioning (LGBTQ) youth to develop into healthy, independent, civic-minded adults within a safe and supportive community, and promotes the acceptance of LGBTQ youth in society.

Executive Committee of the Real Property Section of the Philadelphia Bar 1/05-12/08

Women's Community Revitalization Project 2/95-9/2000
Past board member of this community based development organization located in eastern North Philadelphia. Served as the chair of the property management committee, and as a member of the advisory committee, executive committee and the economic development ad-hoc committee.

EDUCATION

Temple University School of Law, Philadelphia, PA
J.D. May 2001
HONORS: Alfred L. Berns Award for excellence in Real Estate
Political and Civil Rights Law Review, Staff Member
Outstanding class performance in the Integrated Transactional Program, Spring 2000
Dean's List: Fall 1998, Spring 1999, Spring 2001

Tyler School of Art of Temple University, Elkins Park, PA
B.F.A. January 1997
Dean's List Fall 1997

BAR ADMISSIONS

Pennsylvania, 2001 and New Jersey, 2001

MEMBERSHIP

American Bar Association, Pennsylvania Bar Association, and Philadelphia Bar Association
Real Property and Probate Section of the American Bar Association, Pennsylvania Bar Association, and Philadelphia Bar Association
American Bar Association Forum on Affordable Housing and Community Development

Alice M. Cathcart

alicecathcart@gmail.com

EXPERIENCE

- 2007-Present **Vice President**, Philadelphia Industrial Development Corporation Philadelphia, PA
Lead PIDC (City of Philadelphia's economic development implementation agency) market development and outreach strategy for early-stage technology companies, including those in the life science, software, and alternative energy industries. Coordinate regional Keystone Innovation Zone state economic development program for The Navy Yard, Philadelphia.
- Define investment strategy, criteria for emerging technology companies
 - Coordinate with other local agencies to recruit Fortune 500 companies to Philadelphia
 - Defined, secured resources, and supervised multi-agency GIS project to expose 10 economic development zones to the public for the first time in 50-year agency history
 - Led effort with finance team to create underwriting procedures for new firms
- 2005-2007 **Marketing Director**, Halloo Communications, Inc. South San Francisco, CA
Developed and executed marketing and product strategy for telecommunications start-up delivering business-critical level voice over IP (VoIP) telephone services to small and medium sized companies.
- Defined target market for product and help develop channel sales strategy.
 - Developed collateral strategy and copy for print, web, and targeted email programs.
 - Defined requirements and supervised development of public website, channel sales portal.
 - Improved organizational capacity by leading process definition and documentation for product development, customer service, and sales support.
 - Led successful participation in major industry tradeshow in collaboration with sales team, including design supervision and production of marketing collateral and communications (*Awarded Best of Show Runner-Up in two marketing categories out of 150+ exhibitors*).
- 2003-2004 **Product Manager**, QuickBooks Group, Intuit, Inc. Mountain View, CA
Responsible for QuickBooks in-product customer assistance and post-launch quality control.
- Developed multi-year product strategy to improve customer ease of learning.
 - Defined & prioritized online, infrastructure, and in-product initiatives to improve customer self-service experience and drive cost savings over proposed off-the-shelf technology.
 - Led definition of product initiative and reporting requirements (including relational database schema design), that resulted in 60% decrease in QuickBooks product crashes.
- 2001-2003 **Program Manager**, QuickBooks Group, Intuit, Inc. Mountain View, CA
Led cross-functional teams to execute complex software development projects. CMM Level II.
- Designed, built, tested, and deployed internal web-based database for QuickBooks release project management – enabled division to avoid outsourcing cost of \$250K/yr.
 - Planned & rolled-out training to 100+ mid-level and senior managers
 - *Awarded QuickBooks Group Innovation Award* (<10 annual awards across division for outstanding business contributions)
 - Managed QuickBooks Enterprise v.1.0 release – Led cross-functional team (engineering, product management, marketing, sales, support, operations) to deliver division's first new major product offering:
 - Initiated formal checkpoints, defined release process quality criteria
 - Increased team accountability and communications through innovations subsequently implemented throughout division to every QuickBooks release.
 - Released product on time with three geographically dispersed teams, late-cycle scope changes, and an original schedule 30% shorter than any prior QuickBooks release.

- Project-managed initial launch of QB Credit Check Service – Led 3rd party remote cross-functional team to define and develop initial offering of client-server integrated service.

2000-2001

Geographic Scientist, U.S. Geological Survey.

Menlo Park, CA

Defined new ways to combine natural & social science data on natural disasters to inform public policy and mitigate future damage and loss. Projects investigated the value of GIS data in communicating risk to residents, business owners, and policy makers.

- San Francisquito Creek Community Resource Management Process, Palo Alto, CA
Developed spatial maps of flood zones and potential mitigation plans, visual representation of cost-benefit analyses in GIS to inform policy decisions regarding several proposed flood mitigation measures.
- Cost-Benefit Analysis (CBA) of proposed GIS national data portal to aggregate and present natural and social science data produced by federal agencies - Designed framework & executed analysis of \$12M federal budget line-item initiative to meet congressional mandate.

EDUCATION

1997-2000

Stanford University, Stanford, CA

M.S., Earth Systems, School of Earth Sciences. Interdisciplinary environmental science and policy. Coursework included Biological, Geological, Physical Sciences, Economics, and Public Policy.

- Program Teaching Assistant, Stanford. Competitively selected to coordinate introductory lecture course with 100 students and small senior-level seminar. Hired & led 6-member teaching staff, tutored advanced writing seminar.
- Environmental Policy Intern, White House Office of Science and Technology Policy, Washington, D.C. Wrote science and policy briefings on climate change and environmental policy for the Science Advisor to the President.
- Ecology Research Assistant on natural recolonization of abandoned pastures, Costa Rica.

1993-1997

Stanford University, Stanford, CA

B.S., Biological Sciences, School of Humanities and Science. Dual honors theses: Biological Sciences (*The influence of invasive species on the reproductive cycle of P. napi*) and International Environmental Science and Policy (*Burden Sharing under the Kyoto Protocol: the Implications of Climate Model Selection*)

- Secured grant funding, planned, and executed independent research butterfly ecology project at Rocky Mountain Biological Lab in Gothic, CO for departmental honors thesis.
- Competitively selected for interdisciplinary international environmental studies honors program.

LEADERSHIP

Board of Directors, Delaware Valley Green Building Council (2009-present)

Chair, Delaware Valley Green Building Council Development Committee (2008-2009)

Board Member, Women's Action to Gain Economic Security, Oakland, CA (2004-2006)

Junior Varsity Girls' Water Polo Coach, Gunn High School, Palo Alto, CA. (2001)

Captain (2 years), Varsity Women's Water Polo, Stanford University (1995-1997)

U.S. Junior National & Senior National "B" Water Polo Teams (1994-1997)

AWARDS

Rotary Foundation International, Cultural Ambassadorial Scholarship, Costa Rica (1997-1998)

Stanford University, Academic All-American all eligible quarters, Stanford in Government Fellowship Recipient (1999), Undergraduate Research Opportunity Grantee (1996), University-wide awards in Freshman year for academic excellence, excellence in non-fiction writing (1994). All-American (1st team) Water Polo (1997).

SKILLS

Fluent in Spanish, French. Some study of Mandarin.

Proficient in MS Office (including Visio). Working knowledge of Adobe design products (Acrobat Pro, Illustrator, InDesign, Dreamweaver), Matlab, HTML, SQL.

MICHAEL S. COOPER

3 N. Columbus Boulevard #236
Philadelphia, PA 19106
(215) 601-3886
msc6581@hotmail.com

OBJECTIVE

To have a challenging and meaningful career in public policy or governmental relations that will provide a continuing environment for learning and growth, while utilizing my experience and strong communication skills.

EDUCATION

Master of Public Administration (MPA), Widener University, Chester, PA, December 2006.

GPA 3.87/4.0 Specialization: Nonprofit Management

Courses included: Budgeting and Finance in Public Administration, Fundraising, Ethics, Personnel Management, Organizational Theory, Quantitative Analysis, and Marketing for Nonprofits

Bachelor of Arts (BA), Political Science, The Pennsylvania State University, University Park, PA, May 2003

GPA 3.04/4.0

EXPERIENCE

Philadelphia Industrial Development Corporation, Philadelphia, PA

Assistant Vice President, Market Development Group, February 2009 - Present

Relationship Manager, Market Development Group, November 2007 – February 2009

- Market Philadelphia's economic development incentives portfolio for the City's industrial sector
- Manage relationships with clients and oversee their financial and real estate transactions to settlement
- Conduct routine market analysis and report findings to educate colleagues and city officials about the sector
- Maintain outreach network of major lenders, real estate brokers, and government officials

Analyst, Financial Services Group, May 2007 – November 2007

- Coordinated, underwrote, and presented prospective loans for companies expanding in Philadelphia
- Managed six tranches of HUD 108 federal revolving loan dollars and wrote application for a seventh
- Wrote multiple grant applications for state infrastructure improvement programs

School District of Philadelphia, Philadelphia, PA

Special Projects Assistant, Offices of Special Finance & Treasury Operations, November 2004–May 2007

- Assisted in the management and reporting of public investment transactions
- Coordinated and executed the review, approval, and payment of invoices for academic programs and monitored accounts
- Conducted forensic auditing and background investigations on students, charges, placements, and services to ensure proper payment and responsible accounting

Foundations, Inc., Moorestown, NJ

Special Projects Assistant, Executive Office, September 2003 - November 2004

- Served as project and research assistant to the CEO and Chief of Staff of education non-profit organization
- Contributed to various projects including grant applications and results-based accountability

ADDITIONAL SKILLS

Microsoft Office applications, SPSS, and Lotus Notes

LEADERSHIP

Member, Urban Land Institute, October 2007 – Present

Member, Penn State Alumni Association, May 2003 - Present

President, Council of Commonwealth Student Governments Alumni Interest Group, April 2007 – March 2009

Ex-Officio Member, Board of Trustees, The Pennsylvania State University, April 2002 – March 2003

Legislative Intern, The Office of State Representative Lawrence H. Curry, September 1999 – June 2000

HONORS & CERTIFICATES

Phi Kappa Phi National Honor Society, December 2007

The Eric A. and Josephine S. Walker Leadership/Citizenship Award, April 2001

Jennifer Lucas Crowther

1522 E. Montgomery Avenue ♦ Philadelphia, PA 19125 ♦ (215) 200-3320 ♦ Jenniferlucas.Crowther@gmail.com

PROFESSIONAL EXPERIENCE

Assistant Vice President, Philadelphia Industrial Development Corp: Philadelphia, PA **June 2008 - Present**

- Evaluated and redesigned a working capital loan product for disadvantaged and minority businesses.
- Developed and implemented a Loan Guarantee Program which enables small businesses to access capital from banks and leverages \$2 million in loans.
- Developed a \$9 million loan program to provide financing to support energy efficiency retrofits and new construction projects for Philadelphia based businesses and nonprofits.
- Developed a \$4.5 million loan program to provide gap financing to support projects that have seen a diminished value in tax credits, reduction in subsidy, reduction in senior lending, or other funding source that prevent the project from moving forward.

Economic Development Fellow, Sports and Exhibition Authority: Pittsburgh, PA **May 2007 - May 2008**

- Prepared a cost analysis on the green building features at the David L. Lawrence Convention Center
- Assisted in the creation of development plans for a \$290 million multi-use arena for the Pittsburgh Penguins – anticipated to be the nation's first LEED certified green arena
- Planned and coordinated 12 events to encourage disadvantaged populations to apply for building trades jobs
- Negotiated license agreements and managed dozens of events in North Shore Riverfront Park
- Supervised the installation of a \$250,000 public art sculpture and arranged a public lecture and reception
- Programmed, redesigned, and updated website using HTML code and Macromedia Dreamweaver software

Outcomes Analyst, PEC Community Development Corporation: Philadelphia, PA **July 2004 - July 2006**

- Coordinated construction process and managed \$1.25 million budget for eight units of affordable rental housing
- Developed and presented testimony on housing related initiatives to Philadelphia City Council
- Generated outcome/indicator reporting and evaluation to foundations, government agencies and funders
- Oversaw the design and implementation of a property/project database (Visual Basic/SQL Server System) to track neighborhood indicators through working with technology/database consultant
- Supervised interns to conduct a neighborhood-based data collection – surveyed over 3,500 properties
- Conducted feasibility studies with consultants on education and arts-based economic development
- Wrote and was awarded grants totaling over \$2 million from diverse funders including the Department of Housing and Urban Development (HUD), William Penn Foundation and the Bank of America

Policy and Advocacy Fellow, People's Emergency Center: Philadelphia, PA **July 2003 - July 2004**

- Tracked and reported on changes in housing and homeless policy, welfare reform and child care
- Provided writing, research, design and implementation support for policy paper on family homelessness
- Coordinated with homeless, affordable housing and welfare coalitions to lobby the U.S. Congress

Policy and Evaluation Fellow, UNU/INCORE: L'Derry, Northern Ireland **May - August 2001**

- Assisted in organizing and implementing four conferences - resulting in publication of handbooks on "Lessons Learned in Reconstruction and Reconciliation"
- Acted as an assistant liaison between grassroots activists, academics and Assembly Members to advocate for conflict-related research to be incorporated into public policy

EDUCATION

Carnegie Mellon University: Pittsburgh, PA

May 2008

H. John Heinz III School of Public Policy and Management

Master of Science in Public Policy and Management

Concentration in Economic Development, Cumulative GPA: 3.97/4.0

Fellowships: Heinz Fellow: Full-Tuition Award for Commitment to the Public Interest *August 2006 – May 2008*

Stephen M. Lauble Fellowship: Public Sector & Economic Development *May 2007 – May 2008*

Haverford College: Haverford, PA

May 2003

Bachelor of Arts in Political Science, Concentration in Peace and Conflict Studies

High Honors, Major GPA: 3.8/4.0; Cumulative GPA: 3.76/4.0,

Institute of European Studies: Vienna, Austria (study abroad)

January – June 2002

RESEARCH EXPERIENCE

Research Assistant, Carnegie Mellon University: Pittsburgh, PA

August 2006 – May

2008

- Investigate the impact on crime and inter-city migration resulting from the demolition of public housing throughout Pittsburgh (assisting Professor Wilpen Gorr)
- Collect quantitative data on inter-city migration, crime and social services using resources such as the Allegheny County Department of Human Services Data Warehouse

Green Project Manager and Editor, Carnegie Mellon University: Pittsburgh, PA

August 2007– May 2008

- Work with a student team to produce a report outlining an economic revitalization strategy for Wilkinsburg, PA
- Conduct a historical statistical analysis to determine the correlation between the property tax rate and other variables such as population loss, foreclosure rate, and vacancy rate
- Assess the feasibility of using tax abatement programs and green initiatives as tools of economic revitalization

AWARDS & RECOGNITION

Phi Kappa Phi Honor Society: Carnegie Mellon University Chapter

April 2008

Phi Beta Kappa: Pennsylvania Chapter

May 2003

Herman M. Somers Thesis Award: Exemplary Senior Thesis in Political Science

May 2003

Haverford House Fellowship: Community Service and Employment Program

July 2003 – July 2004

Peace & Global Citizenship Fellowship: Fieldwork on Reconciliation Policies

May – August 2001

COMMUNITY INVOLVEMENT

Marketing Associate, Carnegie Mellon's "Heinz School Review:" Pittsburgh, PA

August 2006 – May 2008

- Design and implement a marketing strategy for the "Heinz School Review," a student-run policy journal, through the use of press releases, informational posters, online media and publicity fliers
- Host "Heinz Review" launch events at Carnegie Mellon University's Alumni and Visitation Weekends

Haverford House Fellow, Haverford House: Philadelphia, PA

July 2003 – July 2004

- Implemented programs with team to nurture new connections between Haverford College, the City of Philadelphia and community-based organizations by coordinating alumni networking sessions and recruiting organizations to host future fellows

Teaching Assistant/Intern, Peace & Global Citizenship: Haverford, PA

January 2001 – May 2003

- Trained new interns for fellowships abroad as well as designed and implemented internship evaluation process
- Led and facilitated class dialogue and small group sessions: Peacebuilding Course, Fall 2001

SKILLS

Operating Systems: Windows 98, Windows 2000, Windows XP, and Vista

Software Packages: Microsoft Office applications: Access, Excel, Outlook, Project, PowerPoint and Word
Macromedia Dreamweaver 8, Paint Shop Pro 9, HTML Script, Minitab, and SAS

Jennifer Lucas Crowther ♦ 1522 E. Montgomery Avenue ♦ Phila, PA 19125 ♦ (215) 200-3320 ♦ Jennifercrowther@gmail.com

Nancy J. DAY
3220 Stanwood Street
Philadelphia, PA 19136
215-333-0543

Education

Frankford High School, Oxford Avenue, Philadelphia, PA
Fleisher School of Art, Catherine Street, Philadelphia, PA

Experience

Philadelphia Industrial Development Corporation - May 1998 – Present
1500 Market, Philadelphia, PA 19102

Portfol Manager

- Insurance Monitor
- Employment Monitor
- Loan Monitor
- Internal and external Portfol software support.
- Generates internal reports
- Create and maintain access database
- Research data and program resources
- Manage data; capture stats for quarterly reports

Bustleton Eye Associates – Sept 1986 – May 1998
Bustelton Avenue, Philadelphia, PA 19152

Office Manager

- 3rd Party Insurance Billing
- Patient preparation
- Receptionist
- Appointment scheduling
- Process patient billing

Talco Metals – January 1984 – June 1986
Unruh Street, Philadelphia PA 19149

Accounting

- Process customer billing
- Accounts Receivables



B. Joan Dougherty

Objective To make available funds from public sources for use in industrial neighborhoods to further the needs of the surrounding community.

Experience

1997 to Present Philadelphia Industrial Development Corporation
Urban Industry Initiative Phila., Pa.
Financial Services Lender/Consultant
Initially Consultant to Manufacturers in UII target Area.
Duties expanded to city-wide in 2000
Lending under PIDC and UII policy includes interviewing clients, analysis of financial statements, preparing and presentations to loan committee, interaction with Pa. State personnel, lawyers and accountants.

1988 to Feb. 1997 Frankford Bank, N.A. Phila., Pa.
Vice President/Lender/Commercial Credit Manager
Developed \$2MM small business portfolio of credits, \$125,000 or less, including start-ups, and many difficult to place community based businesses.
Responsible for credit analysis, documentation, and collateral records
Supervised a staff of five
Member of Loan Committee

1985-1988 Bank Leumi Le Israil B.M. Phila., Pa.
Assistant Vice President/Commercial Credit Manager
Responsible for Commercial and Consumer Credit Administration/Loan Accounting Reporting/Documentation and Collateral Control
Assisted Loan Review and Recovery
Supervised a Staff of four
Member of Loan Committee

1969 -1985 Meridian Bank (Formerly Central Penn Bank) Phila., Pa.
Assistant Cashier/Commercial Credit Manager
Responsible for Commercial Credit Administration
Supervised a Staff of fifteen
Taught RMA Omega to Credit Analysts and Management Trainees

Education

1977-1980 LaSalle University Phila., Pa.
B.S., Finance with a minor in Economics
Graduated Magna Cum Laude - May 1980

Carol J. de Fries

2119 S. Hicks Street

Philadelphia, PA 19145

(215) 385-1170

Email: carol.defries@gmail.com

PROFESSIONAL EXPERIENCE

Philadelphia Industrial Development Corporation (PIDC), Philadelphia, PA

Vice President, Market Development

3/07-present

Responsible for the economic development of Philadelphia's growing and dynamic cultural, civic, and non-profit sector. Manage relationships with more than 200 clients in the delivery of PIDC's financing and real estate services. Negotiate with management, real estate, and financing professionals in the development of new facilities, renovation of existing buildings, and the purchase of real estate. Work with Philadelphia's higher education and medical community in achieving their campus expansion plans. Assist non-profit organizations with state and City capital grant processes and advise organizations on how to access these funds. *Accomplishments include:*

- Oversee the administration of the City's new Cultural Corridors Program and the award of \$80 million in grants to cultural organizations in Philadelphia.
- Facilitated and completed the Barnes Foundation lease agreements with PIDC and the City for the construction of a \$150 million art education facility on the Parkway.
- Worked with the Philadelphia International Airport and City to facilitate a \$45 million expansion of Southwest's terminal, \$90 million in upgrades to US Airways facilities, and \$20 million in new concession improvements in airport terminals.

University of Pennsylvania, Philadelphia, PA

Executive Director, Office of Government, Community and Public Affairs

7/99 – 2/07

Advanced Penn's interests with regards to the Federal, State, and City governments, community organizations, higher education associations, and civic organizations to which Penn belongs. Coordinated annual strategic plan for office, staff projects and new policy development initiatives for Vice President. Prepared policy and issue briefings for University's President and Vice President and advised on strategies. Staffed Trustee committees for external affairs and neighborhood initiatives. Managed office communications and public relations to senior university administration, trustees, faculty, staff, and students, external constituencies, and government and civic leaders. *Accomplishments included:*

- Monitored \$1.6 million budget and served as the Vice President's chief of staff of 15 professional and administrative personnel.
- Directed Department during three-month vice president search process.
- Coordinated Penn's broad Philadelphia economic development priorities with various external organizations. Organized with Temple University, the Governor's Conference of Pennsylvania's University and College Presidents, including creation of proposals for new state economic development programs that would enhance higher education's role in Pennsylvania's growth.
- Managed department's marketing and public relations materials including the creation of Penn's "Community Services Directory" and companion website, and the "University of Pennsylvania Partnerships with the West Philadelphia Public Schools" brochure.

Commerce Department, City of Philadelphia, Philadelphia, PA
Special Assistant to the Director of Commerce

5/95 - 7/99

Managed special economic development initiatives, external affairs, and public relations for the Commerce Department. *Responsibilities included:*

- Prepared Director for briefings with the Mayor, Council members, Governor, federal officials, other elected and appointed officials at all levels of government, corporate, media and international dignitaries via presentations, issue papers, written testimony, and speeches.
- Directed operations for the Mayor's Economic Development Cabinet and its Executive Committee.
- Created marketing and public relations plans that highlighted positive city business activity.
- Organized Mayoral media events, prepared press releases and articles for publication, produced advertisements and marketing collateral material for the Mayor's Business Action Team.
- Co-chaired the Philadelphia College Student Retention Committee, an initiative created to retain graduate and undergraduate students in Philadelphia after graduation and highlight Philadelphia's colleges and universities as a major asset for businesses.

Chemonics International Consulting Division, Washington, DC
Procurement Administrator

4/92 - 8/94

Managed and executed commodity contracts valued at \$2.4 million annually for over 30 United States Agency for International Development (USAID) funded projects worldwide. Proven track record for meeting and exceeding project deadlines. *Duties included:*

- Consulted with project management to assess objectives, recommend strategy, expedite procurement process, and advised on the implications of federal and international regulations and other constraints.
- Evaluated bids and offers based on cost and applicable qualitative factors, negotiated with suppliers, and established professional relationships with international consultants, government procurement staff, contractors and freight forwarders.

Procurement Assistant

5/90 - 3/92

EDUCATION

University of Pennsylvania, Fels Center of Government, Philadelphia, PA
Master of Government Administration, May, 1996.

Georgetown University, College of Arts and Sciences, Washington, DC
Bachelor of Arts in Government, May, 1989.

HONORS

Philadelphia Business Journal 2001 "Forty under Forty" Recipient.

BOARDS & ACTIVITIES

- Campus Philly, formerly "Knowledge Industry Partnership" (*Chair* 2002 - present)
- Newbold Community Development Corporation (2005 - present)
- Girls Inc. of Greater Philadelphia and Southern New Jersey Board Member (2000 - 08)
- Young America PAC (2002 - 2005)
- Fund for Philadelphia (2003 - 2007, *Secretary* 2004 - 2007)

Lisa Gramiak
9213 Pine Road
Philadelphia, PA 19115
(215) 673-1710

EXPERIENCE

9/81 – Present

Philadelphia Industrial Development Corporation
Philadelphia, PA

Loan Administrator/Assistant to Vice President

Prepares transactions to be presented to PIDC's Loan Committee and prepares fact sheets to be presented to PIDC's Board of Directors. Responsible for initiating and tracking approvals for transactions, interact with City and State Officials on obtaining approvals, prepare client for settlement which includes drafting and issuing commitment letters, reviewing invoices for disbursement of funds, preparing check requests for disbursements. On average monitors 30 transactions at a time. Consistent contact with company executives, attorneys and various company personnel as it relates to the loan closing process. Provides support to the Vice President of Lending. Also responsible for maintaining portfolio database and audit files.

Administrative Assistant to Senior Vice President

Responsible for processing bills for the City, handling internal phone bills, maintaining insurance files, company cars, internal equipment, petty cash and assisting Senior Vice President in day-to-day duties.

Insurance Monitor

Responsible for maintaining insurance files for over 1,000 transactions along with consistent interaction with insurance industry personnel.

Program Assistant and Assistant to Vice President

Prepare and process approvals for transactions, track disbursement of funds, prepare reports for numerous City and Federal agencies. Assist Vice President in day-to-day duties.

Secretary/Financial Services

Typing, filing, scheduling appointments and answering phones for Vice President and other staff. Proficient in Word and Excel.

EDUCATION

1978 – 1981

Graduated from Frankford High School, Philadelphia, PA

**OTHER
INTERESTS:**

Sports, reading, gym and music

Tracy L. Horton

117 N. 15th St., Apt. 1904
Philadelphia, PA 19102

(347) 881-6014
thorton1978@gmail.com

Experience

Philadelphia Industrial Development Corporation (PIDC)

Intern, Finance Group

Philadelphia, PA
05/09-Present

- Manage complex project finance transactions. A representative transaction is a \$37 million supermarket and retail complex for which PIDC is providing financing through a HUD 108 loan, Brownfield Economic Development Initiative funds and New Markets Tax Credits.
- Determine project eligibility for economic development programs, consistency with internal policies and priorities, and financial viability. Examples include a proposed supermarket and mixed retail development in an underserved low-income community and a planned mixed retail and residential use of an historic building in an area targeted by the city for economic revitalization.
- Research federal, state and local economic development funding programs. Analyze and explain requirements and parameters of programs in memoranda that senior staff use to formulate internal policy and implementation strategies.

City of Philadelphia Law Department

Volunteer, Tax Unit

Philadelphia, PA
11/08-05/09

- Provided part-time, pro bono legal services related to tax collection initiatives. Drafted memoranda on Pennsylvania regulations and other states' practices for inter-agency distribution. Reviewed legal briefs.

Weil, Gotshal & Manges LLP

Associate, Corporate

New York, NY
03/06-05/08

- Represented issuers, underwriters, collateral managers and monoline insurance companies in all aspects of complex securitizations including, CDO's, CDO²'s, asset backed securitizations and derivative transactions, ranging in size from \$400 million to over \$1 billion. Negotiated, drafted and reviewed offering memoranda, indentures, credit default swaps and other transaction documents, managed deal teams, coordinated closings. Representative clients included: Barclays Capital, Cohen & Company, Financial Security Assurance Holdings Ltd., Lehman Brothers, Merrill Lynch & Co, Morgan Stanley, Stone Tower Capital LLC, T2 Advisers, LLC.
- Represented major rental-car company in all aspects of asset backed securitization program, including auction rate notes, variable funding notes, agreements with automobile manufacturers, various amendments to securitization documents and securitization issues raised by acquisition of client by rival rental-car company.
- Represented GE Capital in multiple acquisitions, including the purchase of Merrill Lynch Capital and the \$13.4 billion asset acquisition of most of CitiCapital. Drafted high level securitization issues memos for use of senior management, reviewed and summarized securitization documents, managed structured finance diligence teams.
- Advised monoline insurance company with respect to residential mortgage backed securitization exposure. Drafted issues memos and summaries of findings for use of senior management, participated in presentations to senior management, drafted notice and demand letters, managed diligence team.
- Assisted international NGO in the development of micro-insurance program in Africa. Researched best practices and applicable laws and regulations, participated in status calls with client.
- Updated and revised chapters of *Bringing Rights to Bear: An Analysis of the Work of UN Treaty Monitoring Bodies on Reproductive and Sexual Rights*, published by the Center for Reproductive Rights. Reviewed and summarized comments, statements and recommendations of the UN treaty monitoring bodies.
- Awarded Weil Gotshal Pro Bono Service Award for 2006 and 2007.

Chadbourn & Parke LLP

Associate, Project Finance
Summer Associate

New York, NY
09/04-03/06
05/03-08/03

- Conducted research for and drafted sections of successful bids to assist Millennium Challenge Corporation with implementation of its infrastructure aid programs in Armenia, Benin, Cape Verde and Vanuatu.

- Represented investors in acquisition and further development of wind-powered energy plant in Texas. Drafted construction management agreement, membership interest purchase agreement and due diligence memorandum. Reviewed and revised other project and financing documents, including syndication services agreement, balance of plant agreements and turbine supply agreement.
- Represented syndicate of international lenders in multi-million dollar merger, capitalization, refinancing and corporate restructuring of equity and control of Venezuelan steel corporation.
- Represented General Electric in lease commencement portion of sale-leaseback of gas-fired power plant.
- Awarded Chadbourne & Parke LLP Pro Bono Award for 2004 and 2005.

Education

Columbia Law School

New York, NY

J.D., May 2004

Activities: • *Journal of Transnational Law* – Public Affairs Editor
 • Society of International Law

Awards: • The Parker School Certificate for Achievement in International and Comparative Law

Northwestern University

Evanston, IL

B.A., History and International Studies, June 2000

Publications

- Co-Authored chapter entitled "Utilizing Structured Financing Techniques" in *Reorganizing Failing Businesses, Revised Edition* (2006).
- Co-authored: "Toll Road Update," *Project Finance Newswire*, October 2005; "Ocean Energy: Whose Approval is Needed," *Project Finance Newswire*, August 2005.

Other Information

Bar Admission: New York, 2005

Member: American Bar Association; New York State Bar Association

JOHN D. LENAHA

735 Rively Avenue, Glenolden, PA 19036 * (215) 790-2230 - Business * (610) 532-8679 - Residence

PROFILE

- Strong credit analysis and interpersonal skills acquired over 33 years of progressive commercial lending activity and departmental management responsibilities.
- Extensive experience in developing and implementing community development and small business lending initiatives.
- Broad knowledge of various loan programs offered by public entities such as the Small Business Administration (7a and 504 loan programs), the PA Department of Community and Economic Development (Small Business First, PIDA, and MELF), and local economic development organizations (PIDC, The Reinvestment Fund, and Ben Franklin Technology Partners).

PROFESSIONAL EXPERIENCE:

September, 2009 – Present

Vice President of Lending

PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION (PIDC)

Philadelphia, Pennsylvania

As Vice President of Lending at PIDC, Mr. Lenahan is responsible for the direct supervision of four financial analysts/loan officers within PIDC's lending department. As the Chief Credit Officer, Mr. Lenahan plans, directs, and coordinates all departmental policies and procedures with respect to financial packaging and lending.

February, 1984 – Present

Vice President

PHILADELPHIA COMMERCIAL DEVELOPMENT CORPORATION (PCDC)

Philadelphia, Pennsylvania

Responsible for the direct supervision of four (4) professionals comprising the Lending Department of the Corporation. Manage an existing term loan and credit line portfolio in excess of \$15.0 million. Plan, direct and coordinate all departmental policies and procedures with respect to financial packaging, lending, loan servicing, management consulting, and business development activities. Work with the Fiscal and Legal Departments to prepare annual contract scopes of work for various programs as well as overall departmental budget. Review and interpret federal and state laws and regulations governing the administration of the department's various public funded programs and insure compliance with same. Prepare monthly, quarterly and annual performance reports for Board of Directors and various funding sources. Develop performance goals for program managers and staff and conduct interim and year end personnel evaluations. Work with staff to address and resolve problems involving client relations.

Major Accomplishments

- Promoted from Senior Loan Officer to Manager of Small Business Services within two years of joining the corporation and to Vice President of Lending three years thereafter.
- Oversaw the processing, review and approval of over \$100 million in lending activity as Small Business Services Manager and Vice President of Lending.
- Improved Agency's loan productivity by 250% via a combination of increased loan activity and a 50% reduction in departmental staffing.
- Established and maintained excellent relationships with borrowers, participating lending institutions, loan committee members, and funding sources.

- Served as Chairman of the Loan Policy Committee which produced the first comprehensive loan policy manual for the corporation's five major loan programs.
- Developed underwriting and loan collection procedures in concert with the Agency's Legal Counsel that resulted in a 66% decrease in loan delinquencies.

February, 1979 – January, 1984

Associate Director of Finance/Business Consultant
MID-ATLANTIC TRADE ADJUSTMENT CENTER
 Philadelphia, Pennsylvania

Responsibilities included the financial analysis and strategic evaluation of client firms with revenues ranging from \$3.0 to \$30.0 million. Worked closely with client's senior management to identify and pinpoint operating inefficiencies and to structure business plans designed to improve corporate performance and productivity. Where appropriate, negotiated financing arrangements necessary to strengthen the firm's competitive position within its industry. Acquired considerable experience in statement and cash flow analysis, working capital and capital expenditure evaluations and budgeting and forecasting techniques.

August, 1976 – January, 1979

Financial Analyst
MAINSTREAM ENTERPRISES BUSINESS DEVELOPMENT CENTER
 Philadelphia, Pennsylvania

Responsible for performing credit evaluations and developing financial assistance proposals for small businesses. Also served as a member of the Small Business Administration's Portfolio Servicing Committee.

EDUCATION

September, 1972 to May, 1976

Villanova University
 College of Commerce and Finance
 Villanova, Pennsylvania

B.S. Degree in Business Administration
 Magna Cum Laude – May, 1976
 Major: Industrial Management

AWARDS AND ACHIEVEMENTS

Departmental Key award for distinguished scholarship in Business Administration
 Elected to Phi Kappa Phi National Honor Society – April, 1975
 Elected to Beta Gamma Sigma National Honor Society – April, 1976

SPECIAL TRAINING PROGRAMS

National Development Council's "Business Credit Analysis"
 National Association of Development Companies "SBA 504 Loan Packaging & Credit Analysis"
 Gap International's Breakthrough Intensive Training

SUSAN CASEY LOWRY

823 N. Bucknell Street • Philadelphia, PA 19130

Cell: 918-289-4769

lowry.susan@gmail.com

PROFESSIONAL QUALIFICATIONS

Strong focus on team building, personal ethics, leadership, and goal setting. Excellent communication and multi-phased project management execution skills. Demonstrated problem solving and analytical ability. Team orientation with a proactive, but collaborative approach to identifying market trends, demographic changes, sustainable solutions and opportunities within both existing and prospective clients/markets. Ability to deliver “first to market” critical data platforms. Strong presentation skills.

EDUCATION

The University of Tulsa, Tulsa, OK

BA Communication with minors in Marketing and Spanish 5/03

Universidad de Malaga, Malaga, Spain

Participant in an intense Summer Abroad Immersion Program – Spain 2001 (*certificate*)

The University of Tulsa, Tulsa, OK

MBA Program with emphasis on *Marketing* (*withdrew due to relocation 5/04*)

EXPERIENCE

7/08 –Present Philadelphia Industrial Development Corporation, Phila., PA – Director of Marketing

- Manage and supervise the economic development marketing efforts of PIDC
- Manage the PIDC Annual Report from draft to print production
- Coordinate PIDC marketing initiatives with other Philadelphia city agencies
- Direct and manage all client inquiries as the client relations contact
- Co-managed the redesign and development of The Philadelphia Navy Yard website (www.navyyard.org)
- Active member within the Philadelphia market research community – Help organize quarterly meetings on relevant real estate and development topics and lead discussion
- Direct event planning for marketing of financing programs, press events, market development and Navy Yard tenant events
- Coordinate Response for Proposals (RFP's) on behalf of the City of Philadelphia and PIDC for potential corporate attraction, retention and financing opportunities within various industries sectors both national and international presence
- Lead the “rebranding” initiative of PIDC to give the company a unified and cohesive look among all print materials

6/07 – 7/08 Studley, Inc. – Phila., PA – Public Relations & Marketing (*additional to Market Research*)

- Supervise Philadelphia Branch PR and Media Relations
- Communicate with both SVP of Marketing and Director of Public Relations at corporate headquarters regarding local office updates and budgets
- Communicate with Studley's outside Public Relations firm to define possible press opportunities and media placements
- Approve placement of company advertisements or sponsorships in various regional publications

- 7/04 – 7/08 Studley, Inc. – Phila., PA – Market Research Analyst**
- Supervise branch market research, GIS mapping, demographic and data base information
 - Daily interface with corporate and branch senior management, brokers and affiliate branch offices in dissemination and analysis of market data and trends
 - Serve on Studley's Corporate *Market Research Focus Group*
 - Selected to participate in a quarterly Advisory Board by the *CoStar Group* to discuss market statistics and real estate trends
 - Author of the Quarterly Philadelphia Studley Market and Spacedata Report and annual SERI report
 - Participate in corporate research, training of other Studley researchers, and client presentations
- 8/03 – 5/04 The University of Tulsa – Tulsa, OK – 2nd Assistant Women's Rowing Coach**
- Involved in daily coaching of 30-40 student/athletes at the Division 1 level
 - Regular interface with University Admissions, Academic Services and Compliance
 - Traveled nationally to recruit athletes for The University of Tulsa (TU) rowing program
 - Significant involvement with special event fundraising and public relations

SPECIAL PROJECTS

- Manage and participate in PIDC's office activities such as the softball team and Broad Street Run participation
- Organized Studley's participation in Lee National Denim Day fundraising event supporting the cure for breast cancer in both 2005, 2006 and 2007
- Organized Studley's participation in the NK Challenge - An 18 mile rowing fundraiser to support a rowing program for inner city youth in Philadelphia
- Organized 2004 TU Row for Humanity Fund Raising Event to support Tulsa's local Habitat for Humanity chapter

ACTIVITIES/LEADERSHIP

- Serve on the Philadelphia Chamber of Commerce "Small Business Excellence Awards" Committee
- Member of Urban Land Institute
- Member of the US Green Building Council
- Selected Member of the CoStar Advisory Board – Philadelphia Region
- Member of TriState Realtors Commercial Alliance
- Member Undine Barge Club, Philadelphia, PA – High Performance Rowing Team, 2004-2008
- Fitness Instructor – Sporting Club at the Bellevue – Philadelphia, PA, 2007-present
- Assistant Novice Coach - Conestoga Crew Club, 2008 season
- Volunteer Coach – Conestoga Crew Club, 2009 Season

AWARDS/RECOGNITION

- 2007 Nominee for Studley Employee of the Year
- 3 time United States Rowing National Champion and 4 time International Gold Medalist, 3 time and current Gold Medalist - The Head Of The Charles Regatta

CERTIFICATIONS

LEED AP Certification 3/09

Pennsylvania Real Estate Salesperson License 5/06 (*Temple University – Philadelphia, PA*)

US Rowing Level II Coaching Certification 2/04

JOSEPH A. MEE
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e-mail: jacor@pidc-pa.org or meejoemee@comcast.net

WORK EXPERIENCE:

- 1986 To Present: **PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION (PIDC)**
Philadelphia, PA
- 1997 to Present: **Vice President - Lending**
- Chief Credit Officer (2000 -2009)
 - Chief Administrative Officer (2000 – Present)
 - Chief Loan Workout Officer (1990 – Present)
 - Loan Administrator of the Philadelphia Welcome Fund/\$180,000,000 loan pool
 - Property Manager for properties valued at \$10,750,000
 - Portfolio Manager for over 1,890 loans with total original value of over \$1,138,000,000, current balances of \$480,000 and a default rate of 3.95%.
 - Currently serve as Assistant Secretary & Assistant Treasurer of all corporate entities
 - Assisted in authoring agency credit manual.
 - Responsible for coordination of all Loan Committee and Board activities
 - Supervise five people in regards to all business lending activities
 - Annually review financial statements of all open loans in portfolio
 - Collected over \$60,000,000 in PIDC tenure
 - Constant contact with company President's, Senior Management, Accountants, Lawyers, Title Companies, Bankers & Real Estate Brokers.
- 1990 to 1997 **Director of Loan Administration and Collections**
- Compliance Manager for all agency governmental loan programs
 - Assisted in securitization of \$7,000,000 in loans
 - Liaison for all Federal, State and Local Development Programs
 - Supervise six people
 - Reduced delinquent accounts by 20% over 40 month period
 - Work extensively with company Presidents, Senior Management, Attorneys and Accountants
 - Coordinated closing of over 600 transactions
 - Participated and Testified in Bankruptcy Court Proceedings
 - Workout of all delinquent loans
 - Responsible for Board and Loan Committee Agenda Preparation
- 1986 to 1990 **Financial Analyst**
- Analyzed company statements and performed credit analysis for all loan transactions
 - Prepared presentation to Senior Management and Loan Committee on financial transactions
 - Negotiated numerous loan-related issues with clients and representatives
 - Coordinated and supervised of all loan transactions.

1982 to 1986

MERRILL LYNCH PIERCE FENNER AND SMITH

Philadelphia, PA

Customer Accountant

- Worked with 5,000 customer accounts
- Provided troubleshooting and problem-solving support services to 40 retail stockbrokers, their clients and Home Office
- Reduced delinquent accounts by 25% during tenure
- Reduced compliance issues by 15% during tenure
- Provided research and analysis to Operations Center Senior Management.

1979 to 1981

THOM McCAN SHOE COMPANY

Worcester, Massachusetts

Assistant Regional Merchandiser

- Provided support services to 145 retail stores
- Monitored, supervised and supplied inventory for each store
- Budget preparation and analysis for Mid-Atlantic Region
- Responsible for planning future shoe lines in conjunction with buyers for Mid-Atlantic Region

1977 to 1979

PHILADELPHIA POLICE DEPARTMENT

Philadelphia, PA

Patrol Officer

- Reduced overall crime in sector by 20% in conjunction with two other officers during tenure
- Made numerous felony, misdemeanor and summary arrests
- Testified in criminal court proceedings
- Organized and planned numerous social and charity functions

EDUCATION:

1992

LASALLE UNIVERSITY

Philadelphia, PA

M.B.A. Finance (GPA 3.10)

1977

PHILADELPHIA COLLEGE OF TEXTILES AND SCIENCES

Philadelphia, PA

B.S. Marketing & Accounting (GPA 2.85)

1973

NORTHEAST CATHOLIC HIGH SCHOOL FOR BOYS

Graduated with Distinction

TECHNOLOGY: Sound working knowledge of Windows XP, Excel, and Word
Interests include running, reading, basketball, coaching and the Stock Market.

ANNE BOVAIRD NEVINS

823 N. 25th Sreet | Philadelphia, PA 19130 | 610-724-2499 | annebnevins@gmail.com

PROFESSIONAL EXPERIENCE

PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION (PIDC)

Philadelphia, PA

Vice President, Market Development

2009 – Present

Assistant Vice President, Market Development

2007 - 2008

- Develop and oversee relationships with businesses and real estate developers in Center City Philadelphia, focusing on the office, hospitality and retail sectors. Lead clients through initial deal structuring, application, approval and settlement process for financing and real estate transactions. Responsible for more than \$15 MM in settled financing transactions leveraging approximately \$100 million in private investment, including a new 230-room upscale boutique hotel opening in October 2009.
- Manage proactive efforts to retain major office tenants in the central business district, resulting in the retention of 36 corporations since 2007. Presented on PIDC's programs and services to 35 real estate brokerage and law firms in the past two years. Writing a new marketing publication to promote Philadelphia as a premier business location.
- Analyzed the impact of Philadelphia's tax structure on financial sector firms and recommended changes to make the city a more competitive location for that industry. Attracted two financial sector firms to Philadelphia in 2008 with employment representing more than \$50 MM in taxable annual wages.
- Engaged with more than 15 real estate developers with active proposals for new hotels to serve the expanding Pennsylvania Convention Center. Secured \$10 MM in state grants for two Center City hotel projects in 2008.
- Managing RFP process for a market study on entertainment venues in Center City to analyze the feasibility of a \$35 MM project to redevelop an existing historic building into a live entertainment destination.

HISTORIC PHILADELPHIA, INC.

Philadelphia, PA

Director of Development

2005

- Created and implemented strategic fundraising campaign for \$8 MM start-up initiative and capital project to renovate underutilized 8-acre park site, create a new heritage tourism attraction, and re-brand the experience of Philadelphia's historic district. Raised more than \$1.65 million from corporate, foundation and individual sources in six months.
- Maintained and strengthened relationships with sponsors representing \$7 MM in pledges, developed comprehensive sponsorship benefits packages, and produced three events resulting in positive sponsor feedback and additional lead generation.

KIMMEL CENTER, INC.

Philadelphia, PA

Associate Director, Corporate Sponsorships

2004 – 2005

Corporate Relations Manager

2003 - 2004

- Designed and managed a new strategic plan for increasing annual giving in the corporate sector. Created promotional materials and systems for fundraising campaign that increased corporate annual fund contributions by more than 50% in one year.
- Led solicitations for \$50,000+ corporate sponsorships and operating support. Prepared and presented proposals and supporting materials and managed follow-up for sponsorship campaign to achieve revenue goal of \$1.2 million annually.
- Created marketing promotions, employee benefit programs and community outreach events with corporate sponsors.
- Solicited corporate sponsorships for Annual Gala events in conjunction with a Corporate Committee composed of twenty top CEOs and business leaders in the Philadelphia region.

SALT LAKE ORGANIZING COMMITTEE FOR THE 2002 OLYMPIC WINTER GAMES

Salt Lake City,

UT

Domestic Dignitary Program Manager

2002

Federal Relations Coordinator

2001 – 2002

- Served as liaison to federal agencies on international entry procedures for Olympic athletes and officials, Olympic-related education programs for Utah students, and federal funding for the Games.
- Organized attendance at the 2002 Olympic and Paralympic Winter Games by the U.S. President, Vice President, Cabinet officials and members of Congress, including security arrangements, logistics and protocol.
- Managed 10-person staff of employees and volunteers to provide customized logistical arrangements and hospitality services for dignitaries attending the Games.

THE WHITE HOUSE, Office of Cabinet Affairs
Director of Special Projects
Special Assistant to the Cabinet Secretary

Washington, DC
2000 - 2001
1999 - 2000

- Coordinated activities of task force comprised of 27 federal agencies responding to resource needs for the 2002 Olympic Winter Games in Salt Lake City, including transportation, security, and international entry procedures.
- Attended and organized Cabinet meetings and prepared related briefing materials and talking points for the President and Chief of Staff.
- Arranged Cabinet participation in Presidential initiatives, events, and travel. Accompanied and provided logistical support for members of the Cabinet who traveled with the President and First Lady to England and Ireland in 2001.

EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA
Master of Business Administration; Major in Real Estate

Philadelphia, PA
2007

- Palmer Scholar, indicating academic achievement in the top 5% of the MBA graduating class.
- Co-President, Sports Business Club; Director of Client Development, Wharton Community Consultants; Director of Strategy, Summer Public Interest Fund; Event Director, Wharton Women in Business 2005 Conference.

UNIVERSITY OF PENNSYLVANIA

Bachelor of Arts in Political Science, Minor in Economics, summa cum laude, GPA: 3.88

Philadelphia, PA
1999

- Member, Phi Beta Kappa.
- Started as Volunteer Coordinator and was promoted to Director of Scheduling and Advance for a successful congressional campaign. Took a one-semester leave of absence and graduated on time. (Fall 1998)
- Intern, The White House, Legislative Affairs Office of the Vice President (Spring 1998 - Penn in Washington DC).
- Intern, The White House, Office of Cabinet Affairs (Summer 1997).

ADDITIONAL PROFESSIONAL EXPERIENCE

- Only non-City employee asked to serve on the staff of the Mayor's Task Force on Tax Policy and Economic Competitiveness (2009).
- Member of advance team for former President Clinton during travel to Philadelphia for events (2004 - present).
- Managed visit by former President Clinton to Malawi to launch new international development initiative for the Clinton Foundation (2006).
- Served as MBA summer associate in the University of Pennsylvania's Facilities and Real Estate Department (2006).
- Consulted to the 2006 Olympic Winter Games in Turin, Italy on the development of a dignitary hospitality and logistics program (2004).
- Managed logistics and oversaw 150+ volunteers for the Inaugural Ceremony of Pennsylvania Governor Edward G. Rendell (2003).

BOARDS AND COMMITTEES

- Executive Committee of the Board of Directors of the Fairmount Community Development Corporation (2009).
- Chair, Financing and Incentives Sub-Committee, Philadelphia Retail Marketing Alliance (2009).
- Executive Committee, Urban Land Institute (ULI) Young Leaders Group, Philadelphia District Council. Launched a leadership exchange program between ULI District Councils in Philadelphia, Washington DC, New York, and Boston (2008 - 2009).

SAMUEL V. RHOADS

Home:

8317 Anderson Street
Philadelphia, PA 191118
Phone: 215/753-0572

Work:

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1500 Market Street
Philadelphia, PA 19102-2126
Phone: 215/496-8132
Fax: 215/977-9618
Email: srhoads@pidc-pa.org

PROFESSIONAL EXPERIENCE

- 1/02 – present **Senior Vice President, Philadelphia Industrial Development Corporation**
Philadelphia, Pennsylvania
In charge of client relations for real-estate development projects throughout the City of Philadelphia. Responsibilities include marketing and outreach to prospective developers and coordination of financing assistance, land sales and real-estate development services to developer clients. Developer clients include for-profit real-estate developers, community-based development groups, non-profit institutions, and for-profit corporations with development needs. Significant projects include \$1 billion expansion of the Philadelphia Sports Stadium District, disposition of the former Civic Center site in University City for state-of-the-art health care and research facility and major neighborhood and center-city based industrial, commercial, and retail development.
- 1/95 – 12/01 **Vice President, Philadelphia Industrial Development Corporation**
Philadelphia, Pennsylvania
Responsible for: financial structuring and negotiation of public loans to major real-estate development projects in Philadelphia. Structured financing for six major center-city hotel projects and PNC Bank's new operations center leveraging project costs of over \$500 million. Developed the Tax Increment Financing (TIF) program for the City of Philadelphia.
- 6/93 - 12/94 **Lending Officer, New Jersey Economic Development Authority**
Trenton, New Jersey
Responsible for program design, review and approval of loan documents, loan disbursal and project monitoring, and internal and external program reporting for Public Lending Unit. Closed and monitored 350 loans and 30 grants totaling \$350 million to New Jersey School Districts and local governments under an innovative, state-wide public funding program.
- 9/88-1/91 **Program Director, Shared Housing Resource Center**
Philadelphia, Pennsylvania
Provided technical assistance to community-based development corporations in Philadelphia and Delaware Valley on site acquisition, zoning, project finance, construction oversight, tenant selection and management model design of affordable housing. As Acting Executive Director from February 1990 to July 1990, was responsible for agency budgeting financing, staff management, policy and board relations.
- 9/86-6/88 **Junior High School Teacher, Mathematics, Crane School**
Santa Barbara, California
Taught arithmetic, algebra and geometry to fifth through eighth grades. Other duties included curricula evaluation, coaching and supervising week-long field-trips. Assisted to initiate math field day program.

AFFILIATIONS

1996 Graduate of Leadership, Inc.
1997 – Member of the Board, Philadelphia Urban Finance Corporation
1997 – 2004 Member of the Personnel Committee, Philadelphia Yearly Meeting
2002 – 2005 Member of the Board, Friends Hospital
2003 – Trustee, Germantown Monthly Meeting
2004 – Member of the Board, Awbury Arboretum
2004 – Member of the Board, Wistar Institute
2004 – Member of the Board, Wyck House
2005 – Chair of the Board, Thomas Scattergood Behavioral Health Foundation

LECTURES ON URBAN ECONOMIC DEVELOPMENT

3/99 Empowerment Zones, Round II: Implementation Workshop: Washington DC
4/99, 4/01, 3/03 Swarthmore College: Swarthmore, PA
6/99 London Development Partnership: London England
11/99 Commercial Real Estate Executive Conference: Washington DC
5/01 Counselors of Real Estate: Philadelphia, PA
11/02 Princeton University: Princeton, NJ
4/03, 5/04 Drexel University: Philadelphia, PA

EDUCATION

Graduate: Woodrow Wilson School of Public and International Affairs, Princeton University:
Princeton, New Jersey
Received Masters in Public Affairs and Urban and Regional Planning, June 1993. Thesis
on small business incubators.

Law School: Temple University School of Law: *Philadelphia, Pennsylvania*
First year completed, 1990-91. Dean's List.

Undergraduate: Stanford University: *Stanford, California*
Received Bachelor of Arts, June 1986 in interdisciplinary, individually designed major:
Values Technology, Science and Society.

High School: Germantown Friends School: *Philadelphia, Pennsylvania*. Diploma, 1982.

DONNA LEE SMITHERS, CPA
1845 Wynnewood Road
Philadelphia, PA 19151
Work (215) 496-8136 Home (215) 473-4881
Cell (215) 910-0496

EDUCATION:

University of Pennsylvania	Master of Government Administration - May, 1993
La Salle University	B.S. Accounting - May, 1984
Certified Public Accountant	May, 1988

WORK EXPERIENCE:

PHILADELPHIA INDUSTRIAL DEVELOPMENT CORP (PIDC) (2006 – PRESENT)
VICE PRESIDENT – FINANCIAL REPORTING AND ADMINSTRATIVE SERVICES

Manage the preparation of annual financial statements for three independent annual audits for PIDC and related companies. Act as liaison between the auditors and all company management and staff. Create and implement policies and procedures to ensure proper operational efficiencies and internal controls. Complete the 990 and other required tax filings. Oversee administrative services including procurement of materials and supplies, leases and document management.

REDEVELOPMENT AUTHORITY OF THE CITY OF PHILADELPHIA (RDA) (1993 - 2006)
DIRECTOR OF FINANCE AND ADMINSTRATIVE SERVICES

Managed all financial operations of the RDA. Finance included the following departments: Accounting, Audit, Budget, Treasury, Contract Administration and Administrative Services. Specific duties included preparing financial statements, including the annual independent audit reports that became part of the City of Philadelphia's Comprehensive Annual Financial Report, preparing and administering the RDA's annual program and operating budgets, acting as liaison between the independent auditors, RDA management, the RDA's oversight agency and the City of Philadelphia, and resolving all audit findings. Other duties included serving as Chairperson of the RDA's Housing Review Committee that evaluated all housing and construction projects for financial and programmatic viability. Responsibilities required the application of accounting and industry standards: GAAP, FASB, GASB, OMB Circulars, Code of Federal Regulations (CFRs) and the City's Subrecipient Audit Guide.

MAJOR ACCOMPLISHMENTS: Redesigned the accounting system to meet all GAAP and Federal, State and City requirements and management needs. Completed a GAAP Conversion of the RDA's accounting operations to meet accounting and industry standards. Established the proper internal controls throughout the RDA that eliminated audit findings. Established standard operating procedures for Finance and Administrative Services which created efficiencies and significantly reduced the general ledger closing cycle, the invoice payment cycle and improved purchasing operations and inventory control. Established procedures to improve cash management and maximize investment earnings by restructuring and centralizing cash and investment operations and establishing a zero balance account for payroll. Created the Budget Department to standardize and complete a timely annual budget. Created the Internal Audit Department to complete the annual independent audit and procedural reviews timely and according to the required federal, state, city and management standards.

PHILADELPHIA GAS WORKS (1990 - 1993)

ACCOUNTING SUPERVISOR

Supervised the preparation of monthly and annual financial statements and related footnotes submitted to the Chief Financial Officer and Board of Directors. Reviewed account analysis, monthly departmental cost reports and proforma financial statements for new bond issues and refinancings. Was the liaison between the independent auditors and company management for independent audit activities. Created many efficiencies to reduce the general ledger closing cycle and provide monthly financial statements within eight days after month end submitted to the CFO. Created a financial environment that eliminated all audit findings in the accounting department during my tenure.

MEDICAL COLLEGE HOSPITALS (1988 - 1990) (FORMERLY ALLEGHENY & TENET)

ACCOUNTING SUPERVISOR

Supervised the monthly closing process and the preparation of monthly financial statements for six hospital and college entities submitted to the Board of Directors. Completed monthly account and budget variance analysis.

FIRST PENNSYLVANIA BANK (1986 - 1988)

SENIOR AUDITOR

Conducted financial and operational audits in the United States & Virgin Islands. In-Charge auditor on several audits which required developing audit programs for newly established operations, supervising lower level staff and providing performance evaluations. Completed all audits during my tenure twenty two (22%) percent under budget (hours). Was Assistant Manager on two Virgin Island audits which included planning audits.

COOPERS & LYBRAND CERTIFIED PUBLIC ACCOUNTANTS (1984 - 1986)

SENIOR AUDITOR

Completed accounting and audit work in various industries including: Banking and Mutual Funds, Healthcare, Colleges and Universities, other Not-for-Profits and manufacturing. In-Charge accountant over several audits which required overseeing all audit activities and financial statement preparation and following company audit and administrative requirements.

AFFILIATIONS:

American Institute of Certified Public Accountants (AICPA)
Pennsylvania Institute of Certified Public Accountants (PICPA)
Financial Advisor to the Joint Board - Resurrection Community Church
Former Board Member-Chairperson, Finance Committee - Germantown YMCA
Former Vice-Chairperson, Trustee Board - Holy Cross Church

REFERENCES WILL BE FURNISHED UPON REQUEST

WENDY B. WEISS

249 South 23rd Street • Philadelphia, PA 19103
215.496.8115 (w) • 215.837.3666 (c) • ww@pidc-pa.org

EXPERIENCE

- PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION, Philadelphia, PA** 2007 – Present
Assistant Vice President, Financial Services
- Manage the administration, application, and financing processes for the New Markets Tax Credit and HUD 108 programs.
 - Analyze, underwrite, and structure financing for real estate development projects and business expansion purposes. Present credit memoranda for consideration by PIDC's Loan Committee.
 - Manage multiple state and city loan programs designed to create and retain jobs in Philadelphia.
- RADIAN GROUP, Philadelphia, PA** 2006 – 2007
Senior Planning and Reporting Analyst
- Analyzed and reported company's key performance measures.
 - Developed departmental plan, expense budget, and reforecast and perform variance analysis.
 - Designed and implemented streamlined department-wide financial reporting for mortgage insurance operations.
- OPPORTUNITY FINANCE NETWORK (formerly National Community Capital Association), Philadelphia, PA**
(National trade association that provides financing, consulting and training services to community development financial institutions) 2001 – 2006
Senior Associate, Financial Services
- Structured and analyzed loans and investments to community development financial institutions, including loan funds, venture funds, and credit unions.
 - Prepared detailed credit memoranda, analyzed financial, strategic, and business plans, and conducted financial ratio and trend analyses for loans and investments, typically between \$1 million and \$2 million.
 - Conducted and supervised portfolio review of community development financial institution loans and investments, totaling \$25 million.
 - Researched and co-developed a new anti-predatory lending mortgage product for low-income home buyers.
 - Consulted with community development financial institutions, which included facilitating strategic planning, performing competitor analysis, and financial modeling.
 - Prepared curriculum for and instructed community development bankers about effectively underwriting community development financial institutions.
- PMA CAPITAL CORPORATION, Philadelphia, PA** 1998 – 2001
Senior Financial Analyst
- Performed variance analysis on company's monthly financial statements.
 - Used Hyperion to consolidate, analyze and report the company's budgeted and actual results.
 - Conducted financial modeling to develop the company's plan and quarterly reforecast
 - Consulted with company's three insurance subsidiaries concerning achieving company-wide financial objectives and utilizing planning software.
 - Prepared analyses of industry benchmarks and competitor companies' key financial ratios.
- AETNA U.S. HEALTHCARE, Blue Bell, PA** 1996 – 1998
Senior Budget Analyst
- Developed, analyzed, and evaluated a \$150 million advertising and marketing budget.
 - Prepared financial reports for review and approval by the CEO and COO.
 - Implemented and communicated policies and internal controls regarding merger related issues.
- Senior Accountant/Staff Accountant** 1993 - 1996
- Supervised three staff accountants responsible for month-end reporting, general ledger account reconciliation, and receivables.
 - Analyzed pricing and profitability for Self-Insured HMO line of business.
 - Prepared customer funding reconciliations, including analyses and recommendations.
 - Consulted with information technology team to define financial objectives and to test and implement a new financial software application.
- KEYSTONE HEALTH PLAN EAST, Philadelphia, PA** 1991 - 1993
Account Analyst

SHORE, AVRACH AND COMPANY, CPA, Philadelphia, PA
Staff Accountant

1990 - 1991

EDUCATION

DREXEL UNIVERSITY, PHILADELPHIA, PA

Master of Business Administration, December 1997
Finance concentration

TEMPLE UNIVERSITY, Philadelphia, PA

Bachelor of Business Administration, Accounting, May 1990
Order of Omega Honor Society (1989)

CIVIC ACTIVITIES

CENTER CITY RESIDENTS' ASSOCIATION, Executive Board Member and Assistant Treasurer 2007 - present

AMERICAN JEWISH COMMITTEE, Philadelphia Chapter, Executive Board Member 2003 – 2008

DAVID L. EVANS
Pennsylvania Housing Finance Agency
211 North Front Street, Harrisburg, PA 17101
(717) 780-3928, devans@phfa.org

EXPERIENCE:

07/80 – Present **PENNSYLVANIA HOUSING FINANCE AGENCY**
Harrisburg, Pennsylvania

09/89 – Present Position: Assistant Executive Director of Multifamily Housing

The Assistant Executive Director is the head of all multifamily functions of the Agency. This position has responsibility over the entire multifamily process, from the underwriting of a multifamily loan application, to the allocation of low income housing tax credits, through the construction of the project, to the monitoring of the management and maintenance of a development. Along with supervising a staff of ninety-five, responsibilities include presentations to the Board of the Agency; coordinating activities with other agencies of the Commonwealth; developing policies for the multifamily functions; participating in numerous speaking engagements; having familiarity with the various programs that are available; and sitting on and/or chairing various committees on multifamily housing.

01/89 – 09/89 Position: Director of Development

The Director of Development is responsible for the development process of the Agency's multifamily financing programs. The Director also has immediate supervision over the low income housing tax credit program. Responsibilities include the supervision of all multifamily underwriting activities; researching, developing, and implementing new multifamily housing programs; and promoting to outside participants the lending programs available from the Agency.

02/87 – 01/89 Position: Deputy Director of Housing Management

Promoted from the Manager of Auditing position, the Deputy Director of Housing Management assisted the Director of Housing Management in the supervision of the Housing Management Division. Primary responsibilities included the supervision of a staff of financial analysts; monitoring the financial aspects of all multifamily developments financed by the Agency; assisting with the formulation of Housing Management Division policies and procedures on new multifamily programs; and monitoring the use of subsidies and fees received from the Department of Housing and Urban Development.

07/80 – 02/87 Position: Manager of Auditing

As the head of the audit function, responsibilities included the supervision and the review of the financial audits of housing developments. It also included the maintaining of reporting systems to be followed by the operating developments, including the composition of audit and accounting manuals.

06/77 – 07/80 **PEAT, MARWICK, MITCHELL AND CO.**
Harrisburg, Pennsylvania

Position: Senior Auditor

Responsibilities included the administration of the audit field work for assigned clients; the supervision of audit assistants in conducting annual audits; the review of internal controls; and the preparation of financial statements in accordance with generally accepted accounting principles. While principal audit experience was in the manufacturing industry, a primary client was the Pennsylvania Housing Finance Agency.

EDUCATION:

09/73 – 05/77 **SUSQUEHANNA UNIVERSITY**
Selinsgrove, Pennsylvania
BS Degree in Accounting, graduated cum laude

PERSONAL: **Certification:** Certified Public Accountant since September 1979

RESUMES

Attached please find the resumes for all key people contributing towards the project (in order):

City of Philadelphia

- Katherine Gajewski, Principal Investigator
- Alan Greenberger
- Deborah McColloch
- Scott Wilds
- Andrew Rachlin

AFC First Financial

- Jeffery Gatter
- Peter Krajcsa

Ben Franklin Technology Partners

- David Cohen
- James Gambino
- Salvatore Pace
- Jaron Rhodes
- Richard Thompson
- James Woods

Delaware Regional Planning Commission (DVRPC)

- Robert Graff

Energy Coordinating Agency (ECA)

- Liz Robinson

Metropolitan Caucus

- Laurie Actman

Philadelphia Industrial Development Corporation (PIDC)

- Ilene Burak
- Alice Cathcart
- Michael Cooper
- Jennifer Lucas Crowther
- Nancy Day
- B. Joan Dougherty
- Carol de Fries
- Lisa Gramiak
- Tracy Horton
- John Lenahan

TRANSFORMING THE HIGH PERFORMANCE BUILDING MARKET IN SOUTHEASTERN PENNSYLVANIA

- Susan Casey Lowry
- Joseph Mee
- Anne Nevins
- Sam Rhoads
- Donna Lee Smithers
- Wendy Weiss

Pennsylvania Housing Finance Agency

- Dave Evans

The Reinvestment Fund

- Roger Clark
- Donald Hinkle-Brown
- Jeremy Nowak
- Robert Sanders

December 7, 2009

The Honorable Dr. Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585



Dear Secretary Chu:

On behalf of The Enterprise Center, our Board of Directors, the 150 minority-owned Strategic Growth Initiatives we work with yearly, as well as the thousands of minority-owned businesses who serve the Greater Philadelphia region, I am writing to endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program.

The Metropolitan Caucus, with the City of Philadelphia serving as the applicant, is requesting funding for the Greater Philadelphia region, including Philadelphia, Montgomery, Bucks, Chester and Delaware Counties, in the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of regional local governments, while shifting Southeastern Pennsylvania toward a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types: (1) multifamily housing, (2) single family housing, and (3) commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood-based organizations.

Transforming the High Performance Building Market in Southeastern Pennsylvania will directly benefit and create opportunity for small businesses and minority-owned firms, which will in turn create jobs for thousands of workers throughout the region.

Founded in 1989 by The Wharton Small Business Development Center, The Enterprise Center provides access to capital, builds business capacity, and provides business education and economic development opportunities to high-potential minority entrepreneurs. Through our portfolio of business acceleration initiatives, The Enterprise Center (TEC) seeks to better position minority enterprises to compete in local, regional and global economies.

On behalf of The Enterprise Center, our many constituents and regional stakeholders, I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

Della Clark
President

Cc: The Honorable Michael A. Nutter



December 2, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery that together comprise the Metropolitan Caucus, we are writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

Leanne Krueger-Braneky
Executive Director

Sustainable Business Network of Greater Philadelphia
www.sbnphiladelphia.org • 215-922-7400
1528 Walnut Street, 21st Floor, Philadelphia, PA 19102
Recycled Content, 100% Post Consumer

1234 Market Street
Philadelphia, PA 19107-3780
(215) 580-7800
Fax (215) 580-3636



Southeastern Pennsylvania Transportation Authority
Courtesy • Cleanliness • Communication • Convenience

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Pasquale T. Deon, Sr.

Vice Chairman

James C. Schwartzman

Thomas E. Babcock

Joseph E. Brion

Beverly Coleman

Rina Cutler

Thomas Jay Ellis

Stewart J. Greenleaf

Kevin L. Johnson

Daniel J. Kubik

Charles H. Martin

Frank G. McCartney

Michael J. O'Donoghue

Denise J. Smyler

Herman M. Wooden

General Manager

Joseph M. Casey

December 10, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

The Southeastern Pennsylvania Transportation Authority (SEPTA) is pleased to endorse the City of Philadelphia's forthcoming application under the Energy Efficiency and Conservation Block Grant (EECBG) competitive program. Together with The Reinvestment Fund, Pennsylvania Housing Finance Authority, and Delaware Valley Regional Planning Commission, the City has smartly structured a comprehensive retrofit ramp-up strategy around existing regional assets, programs, and delivery systems. By doing so, the program – *Transforming the High Performance Building Market in Southeastern Pennsylvania* – will leverage EECBG funds with unique competitive advantages to achieve immediate job creation and a deep, lasting transformation of Greater Philadelphia's energy efficiency market.

SEPTA's enthusiastic support is predicated on the application's particular focus on investments in transit-oriented neighborhoods. Greater Philadelphia's transit infrastructure is expansive, and its established city centers grew up around our system. These communities are dense, diverse, and poised for reinvestment. Prioritizing energy-efficiency investments in transit oriented neighborhoods will support equitable economic development and showcase the unique role of leveraging transit infrastructure to achieve broader regional sustainability objectives.

As a partner for regional sustainability, SEPTA ultimately is a key stakeholder in the success of this application. We join our partners in urging you to award this grant to the City of Philadelphia, and to provide our region with this invaluable new resource.

Sincerely,

A handwritten signature in black ink, appearing to read 'Joseph M. Casey', is written over a printed name and title. The signature is fluid and cursive, with the first letter of each word being capitalized and prominent.
Joseph M. Casey
General Manager

United States Senate

WASHINGTON, DC 20510

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

I write today regarding the Metropolitan Caucus' application for funding through the "Retrofit Ramp-Up" portion of the Energy Efficiency Conservation Block Grant program. I am told that the Metropolitan Caucus is requesting funding for the application entitled "Transforming the High Performance Building Market in Southeastern Pennsylvania".

I have recently been made aware that the purpose of this application is to achieve immediate job creation and ensure a deep and lasting transformation of the regional energy market. This would allow the Southeastern Pennsylvania region to move towards a clean energy economy. This application plans to target resources for retrofit activities to three product types: multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase.

It is with these goals in mind that I write today to ask that you give the Metropolitan Caucus' application all due consideration.

Sincerely,



Arlen Specter



Robert P. Casey, Jr.



200 S. Broad Street, Suite 700 Philadelphia, PA 19102-3896 | P 215-790-3777 | F 215-790-3720 | W selectgreaterphiladelphia.com

A CEO Council For Growth initiative

December 9, 2009

The Honorable Steven Chu
Secretary, U. S. Department of Energy
1000 Independence Avenue, SW
Washington, D. C. 20585

Dear Secretary Chu:

On behalf of Select Greater Philadelphia, the tri-state Philadelphia region's economic development organization, I am writing in support of the application submitted by the Metropolitan Caucus for funding under the Retrofit Ramp-up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting funding for the application entitled **Transforming the High Performance Building Market in Southeastern Pennsylvania**.

As an organization committed to attracting business to the 11 county region of southeaster Pennsylvania, southern New Jersey and northern Delaware, we believe providing assistance to commercial and residential housing projects in the region in the form of energy efficiency block grants will help stimulate job creation and promote economic development.

The Metropolitan Caucus is a unique entity composed of the Mayor of Philadelphia and the Commissioners and Council members of the four surrounding suburban counties in Pennsylvania. The regional business community has worked together with the Caucus over the past year to address issues of regional concern and work cooperatively as a whole rather than seeking to address issues in a piecemeal fashion.

The purpose of the application is to achieve immediate job creation and transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments. Resources for retrofit activities will be strategically targeted to three product types- multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

In sum, we believe that this application will truly make a difference in the Greater Philadelphia region and urge its favorable consideration.

Sincerely,

A handwritten signature in black ink, reading "Thomas G. Morr". The signature is written in a cursive style with a large, stylized 'T' and 'M'.

Thomas G. Morr
President and CEO



December 11, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Re: "Transforming the High Performance Building Market in Southeastern Pennsylvania" (City of Philadelphia's EECBG application to the U.S. Department of Energy)

Dear Secretary Chu:

PNC Bank is pleased to lend its strong support to the City of Philadelphia's application to the U.S. Department of Energy under its competitive Energy Efficiency and Conservation Block Grant (EECBG) program on behalf of the five Philadelphia metropolitan counties.

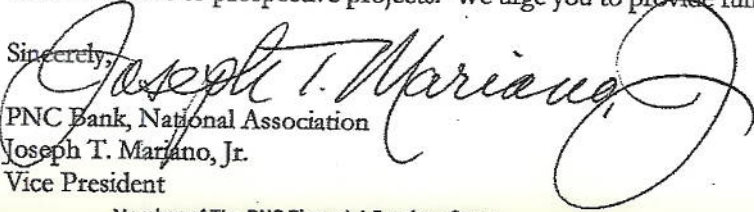
The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—commercial, multifamily housing and single family housing, and will be focused on projects that are under development but need gap financing, low cost loans or other financial support in order to move forward to implementation. We applaud the partnerships this critical funding will strengthen between private lenders, workforce development programs and neighborhood based organizations.

The Reinvestment Fund (TRF) and the Philadelphia Industrial Development Corporation (PIDC) are jointly administering the commercial component of this application, which requests a \$25 million grant to provide seed loan capital and capital/predevelopment grants for building-related energy efficiency project financing throughout the five-county metropolitan region. This is an expansion of the Greenworks Loan Fund that PIDC and TRF have developed together and expect to launch in January, 2010 with \$9 million of loan capital.

PNC has a long and successful history of providing financing in conjunction with TRF and PIDC lending programs. We are interested in providing senior debt commercial financing for this initiative over its three-year program period, subject to the projects having positive impacts for the low to moderate income community, meeting the criteria of CRA and PNC's underwriting requirements and other loan terms and conditions.

We believe this is an important initiative for the region that will rapidly expand the amount of senior debt that is available to prospective projects. We urge you to provide funding for this program.

Sincerely,


PNC Bank, National Association
Joseph T. Mariano, Jr.
Vice President

Member of The PNC Financial Services Group

1600 Market Street Philadelphia Pennsylvania 19103



Philadelphia Workforce
Investment Board

Advancing our economy through our people.

1601 Market Street, Suite 1500
Philadelphia, PA 19103
T. 215 717 2010 F. 215 717 2020
www.pwib.org

December 2, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of the Philadelphia Workforce Investment Board, I am pleased to support the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. In a joint application with the City of Philadelphia, the Southeastern Pennsylvania region is respectfully requesting funding for a project entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The outcomes of the project include job creation and transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multi-family housing, single-family housing, and commercial projects under development but in need of gap financing, low-cost loans, or other financial supports. By providing these financial tools, projects will progress into the development phase or establish partnerships with private lenders, workforce development programs, and neighborhood-based organizations.

Again, on behalf the Philadelphia Workforce Investment Board, I hope you will support this application as it stands to make a critical difference in accessing resources that will transform Philadelphia and the Southeastern Pennsylvania region.

Should you have any questions, please do not hesitate to contact me at (215) 717-2010.

Sincerely,

Sallie A. Glickman
CEO



Philadelphia Industrial Development Corporation

Peter S. Longstreth
President

December 11, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of Philadelphia Industrial Development Corporation ("PIDC"), I am writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block ("EECBG") Program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

As an implementation partner in this application, PIDC proposes to create the Greenworks Revolving Loan Fund which will support energy efficiency retrofits for commercial, institutional, industrial, and public buildings throughout the region. Specifically, PIDC will provide low cost financing for projects that are under development but need gap financing or other financial support in order to move forward. As a flexible source of capital, the Competitive EECBG funds will enable PIDC to offer loans in partnership with banking partners, creating a low-risk vehicle for banks to enter into the energy efficiency market.

The Greenworks Revolving Loan Fund will achieve immediate job creation and promote deep, lasting transformation of the regional energy efficiency market. This will support the economic development and sustainability goals of our local governments. Finally, the Greenworks Revolving Loan Fund will enable Southeastern Pennsylvania to shift towards a clean energy economy. I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

Peter Longstreth
President



Philadelphia Gas Works

Thomas E. Knudsen
President and Chief Executive Officer



800 W. Montgomery Avenue, Philadelphia, PA 19122
Telephone: (215) 684-6051 – Fax (215) 684-6997
Email: Thomas.Knudsen@pgworks.com

December 2, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery that together comprise the Metropolitan Caucus, I am writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

Philadelphia Gas Works is proud to have assisted in the production of this application. We look forward to continuing to work with the Metropolitan Caucus and other partners in transforming our regional energy-efficiency markets. I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources in furtherance of that mission.

Sincerely,

A handwritten signature in black ink, appearing to read "T. Knudsen", written over a horizontal line.

Thomas E. Knudsen
President and
Chief Executive Officer



Philadelphia Building and Construction Trades Council — AFL-CIO

2791 SOUTHAMPTON ROAD, SUITE 100 • PHILADELPHIA, PA 19154 • (215) 677-8500 • FAX (215) 677-7918

SAMUEL STATEN, SR.
President

PATRICK B. GILLESPIE
Business Manager

PATRICK J. EIDING
Secretary-Treasurer

December 10, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

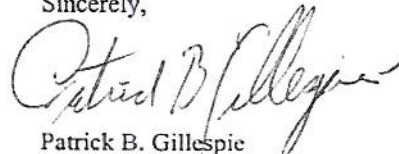
Through this letter I am writing to strongly endorse the Metropolitan Caucus Application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. In this application, the City of Philadelphia is serving as the applicant on behalf of the Philadelphia region to fund an application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

This letter is submitted on behalf of the Philadelphia Building and Construction Trades Council, and its affiliates, representing building trades unions in the Delaware Valley. The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Allocation of these resources for retrofit activities will allow for the creation of family sustaining careers utilizing tri-partite owner/contractor/labor participation in the Step-Up Program, intended to provide ongoing employment for the regional building trades' workforce, while developing increased access for populations often not provided access to rich and rewarding building trades careers.

Approval of this application will provide gap financing, low cost loans, or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

On behalf of our local users of construction services, local contractors and area building trades unions, I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,


Patrick B. Gillespie
BUSINESS MANAGER

PBG/en
opeiu #32
afl-cio

Vice Presidents

JAMES BANFORD
MARTIN CAMPBELL
EDWARD CORYELL

DENNIS CREAN
JOHN DOUGHERTY
JOSEPH DOUGHERTY

MIKE FERA
TOM GALLO
ROBERT HEENAN

MIKE O'MALLEY
JOHN PHILLIPS
JOSEPH RAPINE, JR.

JOSEPH SELLERS, JR.
HARRY WILLIAMS



1315 Walnut Street, Suite 1600 | Philadelphia, PA 19107

www.pacdc.org PHONE 215.732.5829 FAX 215.732.5725

Supporting CDCs. Strengthening Neighborhoods.

December 9, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery that together comprise the Metropolitan Caucus, we are writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

The Philadelphia Association of Community Development Corporation is a citywide membership organization of 80 CDCs and other organizations engaged in efforts to rebuild communities and revitalize neighborhoods. We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

Rick Sauer
Executive Director



Paul M. Hallacher, Ph.D.
Director
Research Program Management
Office of the Senior Vice President for Research
The Pennsylvania State University
304 Old Main
University Park, PA 16802-1504

Voice: (814) 863-9580
FAX: (814) 863-9659
E-mail: hallacher@psu.edu

December 8, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

This letter is to express our strong support for the proposal submitted through the City of Philadelphia, for funding assistance under the DOE Competitive Energy Efficiency Block Grant (EECBG) Program. The proposal, entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*, has been developed and submitted on behalf of the City of Philadelphia and the four surrounding Pennsylvania Counties of Bucks, Chester, Delaware, and Montgomery that together comprise the Metropolitan Caucus.

The proposal calls for establishing a grant and revolving loan program that will support energy efficient building retrofits in residential and commercial (office, industrial and institutional) buildings throughout the region. The purpose of the proposal is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy.

We are extremely excited about this initiative. Penn State along with the Ben Franklin Technology Partners of Southeastern Pennsylvania, the Delaware Valley Industrial Resource Center (DVIRC), Drexel University, and others has been heavily engaged for some years in an effort to establish the Navy Yard in Philadelphia as a hub for clean energy technology development and commercialization. As one result of these efforts, earlier this year the U.S. Department of Energy established the Mid Atlantic Clean Energy Application Center (CEAC) at the Navy Yard under Penn State leadership. The Mid Atlantic CEAC promotes the adoption of clean energy technology by industry and government in the six Mid Atlantic states through education and technical assistance. The proposed EECBG activities and the activities of the Mid Atlantic CEAC will be highly complementary and will be closely coordinated.

We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,



Denis O'Brien
President &
Chief Executive Officer

Telephone 215.841.5670
Fax 215.841.6706
www.exeloncorp.com
denis.obrien@peco-energy.com

PECO Energy Company
2301 Market Street
S26-1
Philadelphia, PA 19101-8699

December 14, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of PECO, Pennsylvania's largest electric and gas utility, I am writing in support of the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. The funding requested under this application will supplement and leverage numerous existing state and local commitments to making the Philadelphia region a global leader in energy efficiency and demand response programs.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

PECO has been pleased to collaborate with the Metropolitan Caucus on the development of this application, working to align and coordinate our energy efficiency and demand response programs under Pennsylvania's Act 129 law and our Smart Future Greater Philadelphia Smart Grid initiative with this effort.

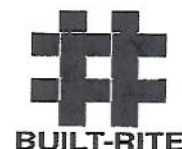
Thank you for your consideration and I hope you will consider this application favorably.

Sincerely,

A handwritten signature in black ink, appearing to read "DPO" followed by a long horizontal stroke.



Philadelphia Area Labor-Management Committee
BUILT-RITE Construction Industry Program
731 S. Broad Street Philadelphia, PA 19147
Tel: 215-732-7476 Fax: 215-732-7479



December 10, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

Through this letter I am writing to strongly endorse the Metropolitan Caucus Application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. In this application, the City of Philadelphia is serving as the applicant on behalf of the Philadelphia region to fund an application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

This letter is submitted on behalf of the Philadelphia Area Labor-Management Committee (PALM), a private, non-profit organization, made up of Philadelphia area owners and users of construction services, over 700 contractors and more than 50 building trades unions. The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Allocation of these resources for retrofit activities will allow for the creation of family sustaining careers utilizing tri-partite owner/contractor/labor participation in the Step-Up Program, intended to provide ongoing employment for the regional building trades workforce, while developing increased access for populations often not provided access to rich and rewarding building trades careers.

Approval of this application will provide gap financing, low cost loans, or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

On behalf of our local users of construction services, local contractors and area building trades unions, I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

Anthony J. Wigglesworth
Executive Director

AJW/m



Pennsylvania Department of Environmental Protection

Rachel Carson State Office Building

P.O. Box 2063

Harrisburg, PA 17105-2063

December 10, 2009

Secretary

717-787-2814

The Honorable Steven Chu
Secretary of Energy
U.S. Department of Energy
1000 Independence Ave., SW
Washington, DC 20585

Re: DE-FOA-0000148
Recovery Act – Energy Efficiency and Conservation Block Grants:
Competitive Solicitation: Retrofit Ramp-Up

Dear Secretary Chu:

I am writing today to express my support for the application of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware, and Montgomery that together comprise the Metropolitan Caucus and their application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. The Metropolitan Caucus is requesting \$60 million of funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The Pennsylvania Department of Environmental Protection (DEP) and its Office of Energy and Technology Deployment (the Pennsylvania State Energy Office) are proud to partner with the Metropolitan Caucus and their other partners in this project. We are committed to providing needed Technical Assistance, guidance on navigating state wide planning, and funding resources and fostering the dialogue between the Metropolitan Caucus and other communities in the effort to replicate successful programs

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing, and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

This project will benefit from significant investments made by the Commonwealth in upgrading the electricity grid and increasing energy efficiency efforts in the commonwealth. Pennsylvania Act 129 of 2008 directed that utilities document a 1% reduction in electricity



december 10, 2009

consumption by 2011, a 3% reduction by 2013 and requires a 4.5% reduction in peak electricity consumption. Additionally, Act 129 mandates the installation of smart meters in a majority of applications. These efforts will be advanced by the recent Department of Energy Smart Grid Investment Grant Awards to Pennsylvania institutions totaling over \$233 million. These investments will benefit the Metropolitan Caucus by allowing them to leverage existing resources and will provide access to more advanced tools.

We look forward to working with the Metropolitan Caucus on this project and we support their application under this opportunity. Its foundational principles of decreasing energy consumption and *Transforming the High Performance Building Market in Southeastern Pennsylvania* are consistent with the goals of the DEP and our efforts to support implementation of the ARRA.

Please feel free to contact me at 717-783-3004 should you wish to discuss these projects in greater detail.

Sincerely,

A handwritten signature in black ink, appearing to read "John Hanger", with a stylized flourish at the end.

John Hanger
Secretary

cc: Carl Bauer

December 9, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Re: "Transforming the High Performance Building Market in Southeastern Pennsylvania"
(City of Philadelphia's EECBG application to the U.S. Department of Energy)

Dear Secretary Chu:

The Pennsylvania Department of General Services is pleased to lend its strong support to the City of Philadelphia's application to the U.S. Department of Energy under its competitive Energy Efficiency and Conservation Block Grant (EECBG) program on behalf of the five Philadelphia metropolitan counties.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—commercial, multifamily housing and single family housing, and will be focused on projects that are under development but need gap financing, low cost loans or other financial support in order to move forward to implementation. We applaud the partnerships this critical funding will strengthen between private lenders, workforce development programs and neighborhood based organizations.

The Reinvestment Fund (TRF) and the Philadelphia Industrial Development Corporation (PIDC) are jointly administering the commercial component of this application, which requests a \$25 million grant to provide seed loan capital and capital/predevelopment grants for building-related energy efficiency project financing throughout the five-county metropolitan region. This is an expansion of the Greenworks Loan Fund that PIDC and TRF have developed together and expect to launch in January, 2010 with \$9 million of loan capital.

One initiative we strongly support in the application is its request for funding to create a 15% participating first-loss credit enhancement program for our Guaranteed Energy Savings Act (GESA) program for public buildings. The GESA program assists and enables Commonwealth agencies in existing facilities to contract for energy conservation measures without the requirement of an up-front capital budget allocation. TRF and PIDC will partner with the Pennsylvania Department of General Services to promote the GESA program for public buildings, as well as provide participating financing that will serve as a 15% first-loss credit enhancement program. By doing so, we believe that an existing pipeline of smaller, sometimes weaker credit government entities will immediately gain access to senior financing sources arranged through participating energy services companies (ESCOs).

We believe this is an important initiative for Pennsylvania that will rapidly expand the amount of senior debt that is available to prospective projects. We urge you to provide funding for this program.

Sincerely,

A handwritten signature in black ink, appearing to read "D. Stultz", with a long horizontal flourish extending to the right.

David Bruce Stultz
Director of Energy Management
Department of General Services
Commonwealth of Pennsylvania

December 2, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585



Dear Secretary Chu:



On behalf of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery that together comprise the Metropolitan Caucus, I am writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting \$60 million of funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.



The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.



I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

A handwritten signature in black ink, appearing to read "James R. Matthews".

James R. Matthews, Chairman
Montgomery County Board of Commissioners



LETTERS OF SUPPORT

Attached please find the following letters of support (in order):

State and Federal

- Pennsylvania Department of Environmental Protection
- Pennsylvania Department of General Services
- Senators Casey and Specter
- Congressman Brady, Pennsylvania 1st District
- Congressman Gerlach, Pennsylvania 6th District
- Joint Congressional
 - Congressman Fattah, Pennsylvania 2nd District
 - Congressman Murphy, Pennsylvania 8th District
 - Congresswoman Schwartz, Pennsylvania 13th District
 - Congressman Sestak, Pennsylvania 7th District

Metropolitan Caucus Members

- Bucks County
- Chester County
- City of Philadelphia
- Delaware County
- Montgomery County

Organizational Supporters

- Ben Franklin Technology Partners
- Delaware Valley Green Building Council (DVGBC)
- Delaware Valley Regional Planning Commission (DVRPC)
- Greater Philadelphia Urban Affairs Coalition (GPUAC)
- PALM/BUILT-RITE
- PECO
- Penn State
- Philadelphia Association of Community Development Corporations (PACDC)
- Philadelphia Building and Construction Trades Council — AFL-CIO
- Philadelphia Gas Works (PGW)
- Philadelphia Industrial Development Corporation (PIDC)
- Philadelphia Workforce Investment Board
- PNC Bank
- Select Greater Philadelphia
- Southeastern Pennsylvania Transportation Authority (SEPTA)
- Sustainable Business Network (SBN)
- The Enterprise Center

TRANSFORMING THE HIGH PERFORMANCE BUILDING MARKET IN SOUTHEASTERN PENNSYLVANIA

Congress of the United States
Washington, DC 20515

December 11, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery that together comprise the Metropolitan Caucus, we are writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting \$60 million of funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

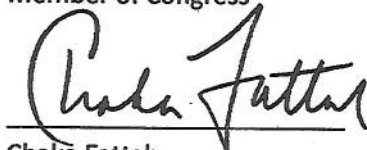
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We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,



Allyson Y. Schwartz
Member of Congress



Chaka Fattah
Member of Congress



Patrick Murphy
Member of Congress



Joe Sestak
Member of Congress



Power of
Coalition

GREATER PHILADELPHIA URBAN AFFAIRS COALITION

December 9, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, D.C. 20585

Dear Secretary Chu:

As President and CEO of the Greater Philadelphia Urban Affairs Coalition, I am writing in strong support of the application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program submitted by the Metropolitan Caucus, representing Philadelphia and the four surrounding counties, Bucks, Chester, Delaware and Montgomery. The funding provided through the Metropolitan Caucus' *Transforming the High Performance Building Market in Southeastern Pennsylvania* application will contribute to achieving immediate job creation; as well as deep and lasting transformation of the regional energy efficiency market.

The mission of the Urban Affairs Coalition *is to unite government, business, neighborhoods, and individual initiative to improve the quality of life in the region, build wealth in urban communities, and solve emerging issues.* Our mission supports the work that is being done in support of the green economy. We believe that support for the green economy, including retrofit activities, is a perfect intersection between sustainability, job creation and business development.

We further believe that the municipalities that comprise the Metropolitan Caucus have built the infrastructure needed to effectively utilize the funding that would be awarded through their application. They have identified: the contractors to do this work; job trainers to train on retrofitting activities; and potential employees

The funds being requested by the Metropolitan Caucus are vital to provide critical jobs in middle and low income neighborhoods. If these funds are awarded, many individuals living in Philadelphia and our surrounding counties will have the opportunity to be trained in an emerging industry. This opportunity would help many of our residents who have been struggling with unemployment, especially those who have been chronically unemployed and live in disenfranchised neighborhoods, to be employed in a sustainable job in which they are earning a livable wage.

In closing, I urge you to award the Metropolitan Caucus' application these critical resources.

Sincerely,

Sharmain Matlock-Turner

December 11, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

The Delaware Valley Regional Planning Commission (DVRPC) is pleased to endorse the City of Philadelphia's application on behalf of the five counties of Southeastern Pennsylvania for funding under the Energy Efficiency and Conservation Block Grant competitive program. DVRPC has played an active role in the broad group of regional organizations assembled to shape the program—entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*—described in the application.

DVRPC serves as the federally-designated Metropolitan Planning Organization (MPO) for the nine counties of Greater Philadelphia, including Bucks County, Chester County, Delaware County, Montgomery County, and the City of Philadelphia, all of which will benefit from the proposed program.

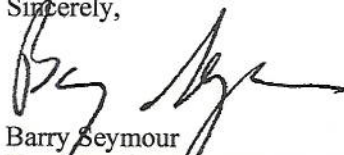
One key distinguishing feature of the proposed program that makes it particularly attractive to DVRPC is that it tackles the challenge of retrofitting buildings for energy efficiency as a *regional* challenge, focusing the retrofit effort on the region's designated centers. These centers are designated in the region's long range plan *Connections: The Regional Plan for a Sustainable Future* as areas for regional reinvestment and redevelopment. *Connections* was unanimously approved in July 2009 by the DVRPC Board—which includes the City of Philadelphia, the surrounding suburban counties, the City of Chester, the Pennsylvania Governor's Policy Office, and others. *Connections* also recognizes that energy efficiency is certain to be a hallmark of successful regions, and sets "building an energy efficient economy" as one of four highlighted regional goals.

In addition, focusing investment and redevelopment in these centers is a key regional goal of the region's Comprehensive Economic Development Strategy (CEDS) "Greater Philadelphia Economic Development Framework". The CEDS reflects the counties' economic development priorities, and was approved by the US Department of Commerce's Economic Development Administration in September 2009.

This proposed project is designed to meet the twin goals of immediate job creation and a profound long-term transformation of the regional energy efficiency marketplace. As noted, it is directly aligned with the goals of the region's Long Range Plan and Comprehensive Economic Development Strategy.

We urge you to award this grant to the City of Philadelphia, and thereby support this outstanding regional effort to transform the energy efficiency retrofit marketplace.

Sincerely,


Barry Seymour
Executive Director



Delaware Valley Green Building Council

Metro Philadelphia | Lehigh Valley | State of Delaware

December 2, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

On behalf of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery that together comprise the Metropolitan Caucus, we are writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

Janet Milkman
Executive Director

One Penn Center | 1617 JFK Blvd., Suite 999 | Philadelphia, PA 19103
phone 215.399.5790 | fax 215.564.1719 | www.dvgbc.org

This letterhead is printed on Mohawk Beckett Concept, 100% post-consumer waste Glacier paper. It is FSC certified, GreenSeal certified, manufactured with Green-e certified renewable wind-generated energy, and is made carbon neutral with the purchase of verified emissions reductions credits.





DELAWARE COUNTY COUNCIL

GOVERNMENT CENTER BUILDING

201 WEST FRONT STREET

MEDIA, PENNSYLVANIA 19063

AREA CODE (610) 891-4270

FAX NUMBER (610) 892-9788

www.co.delaware.pa.us

COUNCIL

LINDA A. CARTISANO
CHAIRMAN

JOHN J. WHELAN
VICE CHAIRMAN

CHRISTINE FIZZANO CANNON
THOMAS J. McGARRIGLE
ANDY LEWIS

December 10, 2009

The Honorable Steven Chu, Secretary
United States Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

As a member of the Metropolitan Caucus comprising the City of Philadelphia and the four surrounding counties of Bucks, Chester, Delaware, and Montgomery, Delaware County Council strongly endorses the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. With the City of Philadelphia serving as the applicant, the Philadelphia region is requesting \$60 million in funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania toward a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing, and commercial projects that are under development but need gap financing, low cost loans, or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs, and neighborhood based organizations.

We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Very truly yours,

A handwritten signature in cursive script that reads "Linda A. Cartisano".

Linda A. Cartisano
Chairman

JIM GERLACH

6TH DISTRICT, PENNSYLVANIA

HOUSE COMMITTEE ON FINANCIAL SERVICES
SUBCOMMITTEE ON CAPITAL MARKETS, INSURANCE, AND
GOVERNMENT SPONSORED ENTERPRISES
SUBCOMMITTEE ON FINANCIAL INSTITUTIONS AND
CONSUMER CREDIT
SUBCOMMITTEE ON DOMESTIC MONETARY POLICY AND
TECHNOLOGY
HOUSE COMMITTEE ON TRANSPORTATION AND INFRASTRUCTURE
SUBCOMMITTEE ON AVIATION
SUBCOMMITTEE ON HIGHWAYS AND TRANSIT
SUBCOMMITTEE ON RAILROADS, PIPELINES, AND
HAZARDOUS MATERIALS

Congress of the United States
House of Representatives
Washington, DC 20515-3806

December 8, 2009

308 CANNON HOUSE OFFICE BUILDING
WASHINGTON, DC 20515
(202) 225-4315
FAX: (202) 225-8440

UKRAINIAN CAUCUS, CO-CHAIR
PROFESSIONAL SPORTS CAUCUS, CO-CHAIR
LAND CONSERVATION CAUCUS, CO-CHAIR

The Honorable Steven Chu
Secretary
United States Department of Energy
1000 Independence Ave. N.W.
Washington, DC 20585

Dear Secretary Chu:

On behalf of the City of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery that together comprise the Metropolitan Caucus, I am writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting \$60 million of funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

With kind regards, I am

Sincerely,



Jim Gerlach
Member of Congress

JG: LS

DISTRICT OFFICES:

BERKS COUNTY
840 NORTH PARK ROAD
WYOMISSING, PA 19610
(610) 376-7630
FAX: (610) 376-7633

CHESTER COUNTY
111 EAST UWCHLAN AVENUE
EXTON, PA 19341
(610) 594-1415
FAX: (610) 594-1419

MONTGOMERY COUNTY
580 MAIN STREET, SUITE 4
TRAPPE, PA 19426
(610) 409-2780
FAX: (610) 409-7988

ROBERT A. BRADY
1ST DISTRICT, PENNSYLVANIA

COMMITTEES:

HOUSE ADMINISTRATION
CHAIRMAN

JOINT COMMITTEE ON PRINTING
CHAIRMAN

ARMED SERVICES
SUBCOMMITTEE ON
TACTICAL AIR AND LAND FORCES

Congress of the United States
House of Representatives
Washington, DC 20515-3801

December 9, 2009

206 CANNON HOUSE OFFICE BUILDING
WASHINGTON, DC 20515-3801

(202) 225-4731
FAX: (202) 225-0088

1907 SOUTH BROAD STREET
PHILADELPHIA, PA 19148

(215) 389-4627
FAX: (215) 389-4636

THE COLONY BUILDING
511-13 WELSH STREET

1ST FLOOR
CHESTER, PA 19013
(610) 874-7094
FAX: (610) 874-7193

2630 MEMPHIS STREET
PHILADELPHIA, PA 19125

(215) 426-4616
FAX: (215) 426-7741

www.brady.house.gov

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

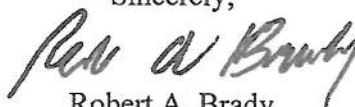
Dear Secretary Chu:

On behalf of Pennsylvania's First District, which comprises part of the Metropolitan Caucus, I am writing to strongly endorse the Metropolitan Caucus' application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program. Together, with the City of Philadelphia serving as the applicant, the Philadelphia region is requesting \$60 million of funding for the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while helping Southeastern Pennsylvania shift towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing, and commercial projects. These projects are currently under development, but need gap financing, low cost loans, or other financial support in order to move forward into the development phase. This funding will also help these projects to pursue partnerships with private lenders, workforce development programs, and neighborhood based organizations.

I urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,



Robert A. Brady
Member of Congress



CITY OF PHILADELPHIA

Office of the Mayor
215 City Hall
Philadelphia, PA 19107
(215) 686-2181
FAX (215) 686-2180

MICHAEL A. NUTTER
Mayor

December 14, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington DC, 20585

Dear Secretary Chu:

On behalf of the City of Philadelphia, I am pleased to present our regional partnership application for funding under Topic 1 of the Energy Conservation and Block Grant (EECBG) competitive program. Building upon a strong foundation of existing assets, we are confident that our proposed \$60 million strategy will fundamentally transform the energy efficiency retrofit market in Southeastern Pennsylvania.

Due to the strength of existing programs and our shared desire to spur job creation as quickly and effectively as possible, while driving the clean energy economy forward, our proposal is designed for near immediate implementation, should funding be granted. Our plan would rapidly scale up three proven programs that not only have existing delivery mechanisms for deep retrofits, but also have identified projects in the pipeline that would allow for rapid startup. The innovation and growth that this funding would provoke lies in the projected establishment of powerful new links between these retrofit programs and private capital pools, small business growth, workforce development, and the emergence of a regional energy efficiency technology sector.

Through its *Recovery through Retrofit* strategy, the White House Middle Class Task Force has framed a vision for an energy efficient country. Our region is poised play a leadership role in demonstrating that big cities and small towns alike are prepared and able to retool for the new energy economy of the 21st century.

Thank you for this opportunity.

Sincerely,

A handwritten signature in black ink, appearing to read "Mike Nutter".

Michael A. Nutter
Mayor

December 11, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585



Dear Secretary Chu:



The County of Chester is cooperating with the City of Philadelphia and our neighboring counties in the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*. The City of Philadelphia is submitting the application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program on behalf of the Metropolitan Caucus, which represents the elected officials of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery. We are writing to endorse this application and the innovative partnership among Greater Philadelphia's local governments that have come together to try to secure these resources which will jump start economic growth throughout the entire Philadelphia region.



The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.



We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,

Terence Farrell
Chairman

Carol Aichele
Commissioner

Kathi Cozzone
Commissioner

December 10, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

The County of Bucks is cooperating with the City of Philadelphia and our neighboring counties in the application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania*. The City of Philadelphia is submitting the application for funding from the Retrofit Ramp-Up portion of the Energy Efficiency Conservation Block Grant program on behalf of the Metropolitan Caucus, which represents the elected officials of Philadelphia and the four surrounding Counties of Bucks, Chester, Delaware and Montgomery. We are writing to endorse this application and the innovative partnership among Greater Philadelphia's local governments that have come together to try to secure these resources which will jump start economic growth throughout the entire Philadelphia region.

The purpose of the application is to achieve immediate job creation and deep, lasting transformation of the regional energy efficiency market to support the economic development and sustainability goals of our local governments, while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations.

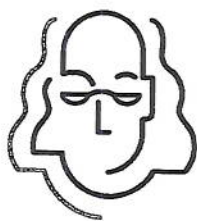
We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources.

Sincerely,



Charles H. Martin, Chairman
Board of Commissioners of Bucks County





Ben Franklin Technology PARTners

Southeastern Pennsylvania

Building 100 Innovation Center
4801 S. Broad Street, Suite 200
The Navy Yard
Philadelphia, PA 19112

December 10, 2009

The Honorable Steven Chu
Secretary
U.S. Department of Energy
1000 Independence Avenue, SW
Washington, DC 20585

Dear Secretary Chu:

For over 25 years, the Ben Franklin Technology Partnership has been investing in innovative enterprises and created commercialization pathways and partnerships that generate wealth through science and technology in the Philadelphia region. As a leader in the Philadelphia region's effort to build the green and renewable energy economy, we strongly endorse the City of Philadelphia's Competitive Energy Efficiency Conservation Block Grant program application entitled *Transforming the High Performance Building Market in Southeastern Pennsylvania* made on behalf of the Metropolitan Caucus for the Philadelphia region.

The main purpose of the application is to achieve immediate job creation and to support the sustainability goals of our local governments while shifting Southeastern Pennsylvania towards a clean energy economy. Resources for retrofit activities will be strategically targeted to three product types—multifamily housing, single family housing and commercial projects that are under development but need gap financing, low cost loans or other financial support in order to move forward into the development phase or in order to pursue partnerships with private lenders, workforce development programs and neighborhood based organizations. This proposal adds a fourth objective...to create opportunities for regional companies, with innovative products that can boost performance and achieve greater energy efficiencies, to demonstrate their value and compete for retrofit work. In that way, we can also support the further development of our technology enterprise sector, provide a market for innovative solutions, and help insure the stimulus provided by the federal funds is recycled within our region.

We urge you to award the Metropolitan Caucus, representing the Greater Philadelphia region, these critical resources through a Competitive Energy Efficiency Conservation Block grant.

Sincerely,

RoseAnn B. Rosenthal
President and CEO

LETTERS OF SUPPORT

Attached please find the following letters of support (in order):

State and Federal

- Pennsylvania Department of Environmental Protection
- Pennsylvania Department of General Services
- Senators Casey and Specter
- Congressman Brady, Pennsylvania 1st District
- Congressman Gerlach, Pennsylvania 6th District
- Joint Congressional
 - Congressman Fattah, Pennsylvania 2nd District
 - Congressman Murphy, Pennsylvania 8th District
 - Congresswoman Schwartz, Pennsylvania 13th District
 - Congressman Sestak, Pennsylvania 7th District

Metropolitan Caucus Members

- Bucks County
- Chester County
- City of Philadelphia
- Delaware County
- Montgomery County

Organizational Supporters

- Ben Franklin Technology Partners
- Delaware Valley Green Building Council (DVGBC)
- Delaware Valley Regional Planning Commission (DVRPC)
- Greater Philadelphia Urban Affairs Coalition (GPUAC)
- PALM/BUILT-RITE
- PECO
- Penn State
- Philadelphia Association of Community Development Corporations (PACDC)
- Philadelphia Building and Construction Trades Council — AFL-CIO
- Philadelphia Gas Works (PGW)
- Philadelphia Industrial Development Corporation (PIDC)
- Philadelphia Workforce Investment Board
- PNC Bank
- Select Greater Philadelphia
- Southeastern Pennsylvania Transportation Authority (SEPTA)
- Sustainable Business Network (SBN)
- The Enterprise Center

TRANSFORMING THE HIGH PERFORMANCE BUILDING MARKET IN SOUTHEASTERN PENNSYLVANIA